Is Your IT Fit for Modern Accountancy?

Checklist for growing accountancy firms

1. Performance & Reliability
☐ Are your systems quick to start and responsive throughout the day?
☐ Is downtime rare and resolved quickly when it does happen?

2. Software & Integration
☐ Are your core tools (Xero, Sage, SharePoint, Teams) well integrated?
☐ Is your team wasting time copying data between systems?

3. Cybersecurity
☐ Are your backups tested regularly?
☐ Are staff trained to spot phishing and social engineering?

4. Support & Responsiveness
☐ Can your team get help within minutes—not hours or days?
☐ Do you have clear escalation routes for urgent issues?

5. Strategic Alignment
☐ Is your IT provider helping you plan for growth and change?
☐ Do you get regular input on technology improvements?

6. Compliance & Data Protection
☐ Are you confident in your GDPR processes?
☐ Do you know where your client data is stored?