

01 Practice Benchmarking

Company

What are the 3 biggest issues currently in your practice?

Issue one

Issue two

Issue three

Practice Performance as at 30th June 2021

Financials (Effective 30 June 2021)

Practice turnover

\$

Work in progress

\$

Debtors

\$

Total wages & super

\$ Exclude Principal/Partners

Total software expenses

\$

Profitability/Revenue %

% (After Principal/Ptrs market ...)

Team (Effective 30 June 2021)

Personnel
Principal/Partners
#

Total staff
Exclude Principal/Part...

Professional staff
#

FTE
#

Charge out rates (Effective 30 June 2021)

Hourly charge
rates (ex GST)

Principal/Partners (\$)

Senior professionals (\$)

Junior professionals (\$)

Admin (\$)

Exclude Principal/Partners

Exclude Principal/Partners

Clients (Effective 30 June 2021)

Lodged returns

#

Business clients

#

SMSFs

#

I>Returns

#

Communication/Collaboration

Are you still using Teams/Zoom, etc in your practice?

Yes

No

If yes, what are you using it for, who with, how regularly and why?

If you are no longer using Teams/Zoom, etc (assuming you did), why not? What were your reasons for stopping usage in your business?

Add answer here

Practice management

Do you run weekly WIP meetings?

Yes

No

Do you run weekly Management meetings?

Yes

No

Did you recruit new staff in the last 12 months?

Yes

No

Did any staff resign from your practice in the last 12 months?

Yes

No

How do you attract new clients? (What has been your most effective strategy - what works/what hasn't?)

Add answer here

What is the most significant change you have made to your practice in the last 12 months?

Add answer here

Services

List core services provided by firm and percentage of revenue:

1. Core service	Percentage of revenue
<input type="text"/>	<input type="text"/>
2. Core service	Percentage of revenue
<input type="text"/>	<input type="text"/>
3. Core service	Percentage of revenue
<input type="text"/>	<input type="text"/>
4. Core service	Percentage of revenue
<input type="text"/>	<input type="text"/>
5. Core service	Percentage of revenue
<input type="text"/>	<input type="text"/>

Technology

List key software packages/applications used in the firm:

1. Software	2. Software
<input type="text"/>	<input type="text"/>
3. Software	4. Software
<input type="text"/>	<input type="text"/>
5. Software	6. Software
<input type="text"/>	<input type="text"/>
7. Software	8. Software
<input type="text"/>	<input type="text"/>
9. Software	10. Software
<input type="text"/>	<input type="text"/>
11. Software	12. Software
<input type="text"/>	<input type="text"/>

Top 3 business clients

1.	Name/Ref code	Industry	Current services	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	
	Turnover	Your fees	Client age	Years as client
	<input type="text" value="\$"/>	<input type="text" value="\$"/>	<input type="text" value="Year started business"/>	<input type="text" value="No. of years"/>
2.	Name/Ref code	Industry	Current services	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	
	Turnover	Your fees	Client age	Years as client
	<input type="text" value="\$"/>	<input type="text" value="\$"/>	<input type="text"/>	<input type="text" value="No. of years"/>
3.	Name/Ref code	Industry	Current services	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	
	Turnover	Your fees	Client age	Years as client
	<input type="text" value="\$"/>	<input type="text" value="\$"/>	<input type="text"/>	<input type="text" value="No. of years"/>

** Private and confidential **