

Paxus Mapping Session Questions

40 open questions across 5 workflow maps. Each question is anchored to the workflow and phase it belongs to; answer them in order while walking the maps, and the answers become the next revision of each map.

Client Lifecycle Workflow

15 questions

Client Onboarding Workflow

8 questions

Weekly Bookkeeping Workflow

6 questions

Month-End Close Workflow

6 questions

Monthly Client Review Workflow

5 questions

B E N A L I

Client Lifecycle Workflow

Q1 PHASE 1
Where do new clients come from, and where do prospects live before Financial Cents?
Referral, website, and any tracking system.

Q2 PHASE 1
Walk the sales and discovery call: who runs it, what script or checklist exists, what gets captured where?

Q3 PHASE 1
How is a price built?
Walk the service fee workbook: tiers, budgeted hours, and how the cleanup range is estimated.

Q4 PHASE 1
What tool produces the quote PDF, and what happens between quote sent and quote accepted?

Q5 PHASE 1
When does the prospect hand over QuickBooks access, and what exactly do you review before pricing?

Q6 **Confirm the tier lineup and what each includes: Basic, Full Service, and Premium appear in welcome packets while Platinum appears in the review template.**

Q7 **Map the thirteen Financial Cents users to roles: who are the staff accountants, leads, controllers, and admin?**

Q8 **Who is TGF's pod today?**
The client sits in three different staff groups and one group's name matches no current user.

Q9 PHASE 2
How is capacity checked when a new client is assigned to a pod?

Q10 PHASE 6
For advisory and fractional CFO clients: what triggers the service, who staffs it, and what is the actual meeting cadence?

Q11 **For each client, where is the billing platform recorded: Stripe, QuickBooks payments, or another rail, plus the draft date?**

Q12 PHASE 5
TGF is tagged NO 1099 but has an open 1099s project and two open vendor cleanup projects. Which is right, and why two?

Q13 PHASE 3
TGF's cleanup project has been open since March with 28 tasks. Real remaining work or a stale project?

Q14 **The owner said "we do a lot of different clients with him" about TGF. How are multi-entity relationships structured across Financial Cents and QuickBooks?**

Client Lifecycle Workflow (continued)

Q15 What per-client variables beyond our fuel list (billing rail, bank accounts, source systems, payroll, sales tax, entity type, tier, report formats, pod) does the team track in their heads today?

Client Onboarding Workflow

Q1

PHASE 6

What does the client-facing onboarding checklist contain, item by item?

The API cannot see it, and it is the client lane of this workflow.

Q2

PHASE 1

How is the engagement actually signed: Financial Cents e-sign or another tool?

Any clients who sign differently?

Q3

PHASE 5

How are the onboarding fee, the 50 percent cleanup deposit, and the monthly draft collected?

Which payment platform per client?

Q4

PHASE 5

Phase 5 says "set client up in various apps": which apps, and does the list vary by tier?

Q5

PHASE 3

Who decides the pod (staff, lead, controller) for a new client, and when?

The welcome packet needs all three names by phase 3.

Q6

What changed between the onboarding template TGF ran in March and the July 3 rebuild, and why?

Q7

PHASE 1

The CSV's "create the onboarding project" step points at the Kick-Off Call template ID. Is that intentional chaining or a leftover to fix?

Q8

PHASE 7

TGF had a 45-day check-in and the kickoff template schedules a 90-day call. What is the standard year-one touch cadence?

Weekly Bookkeeping Workflow

Q1 Is weekly bookkeeping truly weekly for every client, or does frequency vary by tier or client size?

Q2 PHASE 1
Which clients run through Dext, and what is the intake path for clients who submit documents another way?

Q3 PHASE 1
Bill pay: which platforms are in use, who approves payments, and where does the client approve anything?

Q4 PHASE 3
Walk the uncategorized items loop end to end: where does each client's Google Sheet live, what does the lead do with the list, and how do client answers come back in?

Q5 PHASE 3
Which clients get the uncategorized list weekly versus monthly, and where is that setting recorded?

Q6 PHASE 1
Which point-of-sale systems are in play across the client base, and which reports get pulled from each?

Month-End Close Workflow

Q1

PHASE 1

Walk the bank statement pull end to end: which portals, who actually does it (interns or staff), and how long it really takes per client.

Q2

PHASE 2

Where do the recurring monthly journal entries live in your tracking?

They are absent from the close template but central to the month's work.

Q3

PHASE 2

Which clients have journal entry skills built already, and which entry types does the current skill library cover?

Q4

PHASE 3

Custom financial reports: built where, how much do formats vary per client, and what does "update the dates and save" involve?

Q5

What is the target close timeline: statements in by which day, close done by which day, financials delivered by which day?

Q6

PHASE 1

For each client: how many bank and credit card accounts, at which institutions, and where are the portal credentials kept?

Monthly Client Review Workflow

Q1 Confirm the current tier lineup and what each tier includes. The sources conflict: Basic, Full Service, and Premium appear in welcome packets while the review template says Platinum only for controller calls.

Q2 **PHASE 1**
Does every client get controller final review each month, or do lower tiers skip it?

Q3 **PHASE 1**
When the controller finds issues in final review, how do they route back to the lead and staff?

Q4 **PHASE 3**
What happens when a client replies to the delivered financials with questions or corrections?
Who owns that thread?

Q5 **PHASE 3**
What does the monthly controller call cover, and what outputs come from it?
