BACK-OFFICE READINESS CHECKLIST

Eight questions.

Run through them before your next RFP response.

A quick self-assessment to help staffing firms get their back-office, payroll and invoicing processes RFP-ready.



1 **Can you create and send invoices automatically from approved time entries?**
No manual hour compilation or attaching approved-timesheet files — just smooth, automated invoicing.
✓ Yes — You're on track

2 **Do you track outgoing and incoming invoices in one platform?**
Keep all your invoice activity — sent, received, and pending — in one place.
✓ Yes — You're on track

3 **Are approved hours calculated for employees and contractors by pay period?**
Ensure accurate, automated calculations for everyone on your team.
✓ Yes — You're on track

4 **Can your employees view their pay schedules, frequencies, periods and payment dates?**
Transparency builds trust — and reduces repetitive questions.
✓ Yes — You're on track

5 **Do you have a client/sub-vendor hub for invoice exchange, review and acceptance?**
Keep communication and approvals in one central place.
✓ Yes — You're on track

6 **Is your onboarding process simple and well-documented?**
A smooth start sets the tone for long-term success.
⚑ Needs attention — Fix this first

7 **Do you have a way to manage client and sub-vendor relationships efficiently?**
Better collaboration. Fewer delays. Happier partners.
⚑ Needs attention — Fix this first

8 **Do you have the right reporting and visibility into cash flow and performance?**
Make faster decisions with real-time insights.
⚑ Needs attention — Fix this first

A stronger back office means a stronger RFP.
Check. Fix. Be ready.

Better processes. More wins.