



Should You Hire a Business Coach? A Self-Assessment for Accounting Firm Owners

Work out whether coaching would move the needle for your firm before you book a single sales call.

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How to Use This Template

Make a copy of this document (File, then Make a copy), then answer each section honestly. There are no scores to add up: the pattern in your answers is the result. If most sections read back as "fine, under control," you probably don't need a coach yet. If two or more read back as stuck, that's the conversation to have.

Made for coaches by Paperbell — the all-in-one coaching practice tool.

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Where Your Time Is Actually Going

Hours you worked last week: _____

Hours of that spent on client delivery versus running the firm: _____

The recurring task that eats the most time and shouldn't be yours: _____

What's Still Not Delegated

Tasks only you can do today, honestly: _____

Tasks you keep because handing them off feels riskier than doing them: _____

What would have to be true for you to hand those off: _____

Your Current Pricing Model

How you bill today (hourly, fixed fee, value-based, mixed): _____

When you last raised prices, and what happened: _____

The service you know is underpriced: _____

Team and Systems Gaps

The role you most need but haven't hired: _____

The process that breaks every busy season: _____

What you'd fix first if someone held you to it: _____

Budget Check

What you could invest monthly without stress: _____

What a coach would need to change for that to pay for itself: _____

How you'd measure that after 6 months: _____

Red Flags When Interviewing Coaches

No accounting or CPA firm experience, and no plan to bridge that gap.

Can't describe their framework or what a typical engagement looks like month by month.

Teaches value pricing but bills you by the hour.

Guarantees revenue outcomes before understanding your firm.

Notes from your calls: _____

Action	Due Date	Done?