Capacity Assessment

For Firms Managing
500 to 2,500 units

Property Management Accounting Capacity Checklist

15 questions to know if your accounting team is at capacity before it becomes a crisis.

Most controllers already sense the strain, even when they cannot fully prove it to leadership yet.

> **How to use this checklist.** Tick the box for every statement that applies to your team. Count your total checkmarks, then use the scoring guide at the end to see where your team stands.

01 MONTH-END CLOSE CAPACITY

- [ ] **Q1 - Does your month-end close regularly take longer than 10 business days?**
  Highlights whether your close process is falling behind schedule.

- [ ] **Q2 - Is the same person responsible for both AP processing and bank reconciliation?**
  Flag risk when one person controls both tasks.

- [ ] **Q3 - Have you had to delay owner statements in the last 3 months?**
  Shows strain that affects what clients receive.

02 CAM RECONCILIATION PROCESS

- [ ] **Q4 - Is your CAM reconciliation process undocumented or inconsistent?**
  Reveals gaps in process maturity that create risk.

- [ ] **Q5 - Are CAM expense pools reconciled only at year end instead of monthly?**
  Suggests a reactive approach instead of proactive cost management.

- [ ] **Q6 - Has tenant disputed a CAM billing in the last 12 months?**
  May indicate accuracy or compliance gaps.

03 REPORTING QUALITY AND TIMELINESS

☐ **Q7 - Do investor variance reports usually take longer than 5 days after month-end?**
Reflects slow response time to stakeholders.

☐ **Q8 - Is it hard to produce a property-level profit and loss statement on demand for every property?**
Points to limited reporting visibility and control.

☐ **Q9 - Has a CFO, owner, or investor ever asked for a report your team could not produce?**
Reveals gaps in reporting that could limit growth.

04 TEAM RESILIENCE AND REDUNDANCY

☐ **Q10 - Would the departure of one employee significantly disrupt your close cycle?**
Shows how much the team depends on a single person.

☐ **Q11 - Does your accounting team lack property management specific training beyond general accounting?**
Signals a gap in industry knowledge and expertise.

☐ **Q12 - Has an accounting position stayed open for more than 30 days in the past year?**
Reflects hiring challenges and stretched resources.

05 SCALABILITY AND GROWTH READINESS

☐ **Q13 - Has your unit count grown by more than 15 percent in the last 12 months?**
Indicates how much growth pressure your team is under.

☐ **Q14 - Is your accounting team falling behind as your portfolio grows?**
Shows whether operations are ready for what comes next.

☐ **Q15 - Has accounting become a bottleneck to acquire or onboard new units?**
Demonstrates whether finance work is limiting business growth.

Your Score

Total yes answers: ____0____/15

- **0-5, Healthy.** Your accounting operation looks ready to support current growth.
- **6-10, At Risk.** Capacity strain is showing and could soon affect performance.
- **11-15, Critical.** Your accounting function is likely past sustainable capacity and needs attention now.

Many controllers use this checklist as a starting point for a bigger conversation about accounting capacity. Analytix Solutions works with property management firms on these challenges, from CAM reconciliation to month-end close to investor reporting. If your score landed in the "**at risk**" or "**critical**" range, a conversation with the team could help.