# 100+ Tips For Fixing Busy Season

Over the past seven years, we've been on a journey to "fix busy season". While on this journey, we've learned the "fix" it isn't just a couple big things or initiatives, but literally over a hundred little things, working together to improve our Firm and help us reach our🅑. We'll quickly follow up that statement by saying we are far from perfect and still have a lot of room for improvement, but we wanted to share what we've learned, because we truly believe that as we all get better, everyone wins. We hope you enjoy this list ... and extend us some grace ... it's our first version and will hopefully continue to evolve and improve.

Special thanks to our team at SJHL for contributing, providing insight, and been willing to (and sometimes unknowingly) be tested on over the past several years on all the things you'll read here. We've learned a lot -- and made plenty of mistakes, but we feel like we are to a point it's "good enough" to get it out to our friends and colleagues to look at and hopefully utilize to help fix their busy season, too. Over then next several pages, you'll find over 100 tips and tricks we've used to shift our busy season to what it is today.

I would recommend that you:

> Highlight/bold/circle tips you think can have an impact on your Firm.

> Go back through and pick out three to five items you'd like to take action on now.

Fixing busy season isn't a one-time event, it's a journey. We're already working on a play book – expanding on each of these items, and also consider working with other firms one-on-one to help fix their busy season. Please share with us anything your Firm is doing that's not on this list.

Have a great day.

Chet

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# 100+ Tips For Fixing Busy Season

## Your B

> Be Specific.

> Know the B for your team members ... It's simple, just ask the question.

> Once you know the B for your team, look for work and projects that are in alignment.

> With your ideal busy season in mind, reverse engineer to determine what it will take to get you there.

> Visualize specifically what you want your ideal busy season to look like ... what's your B ?

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## Firm

> Enjoy the journey -- celebrate small successes along the way, and don't just keep your eye on the end of the season.

> Allow for margin in your day to get stuff done.

> An awesome time-hack we encourage our team to do is only check email four or five times a day, instead of continuously having it up, the constant interruptions add up.

> Be mindful of how many emails you send and quantify the effect. -- *If I send an email to everyone that takes them five minutes to read and process, I've invested 400 minutes, or approximately seven hours of time -- it better we worth it.*

> Be mindful of Parkinson's Law (work expands to time) when requiring mandatory 60's, 70's, Saturdays, etc. *How much more actually gets done?*

> Pruning your clients - low quality clients who don't appreciate and value you need to be looked at for pruning as your good clients deserve to have that investment in them.

> Have a new client acceptance policy - are they a good fit for your Firm's ? The wrong clients can, and often do, clog the system.

> Adopt a LEAN & Theory of Constraints mindset/ approach.

> Implement the 10/5 Rule: smile at anyone within 10 feet of you and acknowledge (hello/ good morning) anyone within five feet of you -- this applies to clients and team members.

> Implement The First 15™ Reading Program at your firm, encouraging everyone to start their day by reading for 15 minutes.

> Busy season work needs to be profitable, learn what to say "no" to.

> Make an ongoing commitment to identify waste in your system: calendar, e-mail, days, etc.

> Make sure you know who your best clients are and invest time in them.

> *One thing I've done to help with delegation is to look at all of my work and challenge myself with the question of am I the one that really has to do the task, or could someone else do it?*

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## Firm - *continued*

> Have frequent one or two hour training sessions throughout the year, instead of just day long or week long training, it leads to better technical retention.

> Stop saying the word "busy" - we're all busy and no one really cares how busy you are.

> Treat yourself like your favorite athlete - work to make yourself great like them.

> Try your best to make all big changes outside of busy season (at least by December) to get the kinks out and implemented.

> We have a weekly tax meeting during busy season for shared learning and communication for all tax preparers and reviewers - these last between 15 and 30 minutes.

> We try to hold very few morning meetings, allowing our team to do high-impact work when they are fresh and have a sense of accomplishment early in the day.

> We instituted a "Focused Time" in our firm that pairs with our teams peak performance hours of 9:30 am - 11:30 am.

> We recommend cleaning and organizing your desk in December, prior to the rush of busy season -- or, do it now and reap the benefits sooner rather than later.

> *I'm a firm believer in Tony Robbins' CANI! Technique -- consistent and ever ending improvement.*

> We've found improving busy season is a year-round project, you can be doing something each month to make for a better busy season.

> We've invested heavily in our Client Accounting Services area -- improving our clients bookkeeping -- it helps the whole system.

> Our Firm has belonged to a PCPS networking group for the last 20 years and it has had a significant effect on our Firm in many ways. *I highly recommend it.*

> Try the "post-it note effect" writing three to five tasks at the beginning of the day on a post-it note and crossing off as completed.

> A better January leads to a better busy season - make the investment in the right Payroll product and 1099"s to get your year off to a great start.

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## Firm - *continued*

> Consider quick (standing) daily huddles to touch base on open project to reduce email waste/interruptions later in the day.

> Track 13-17 things that went well during the day, it only takes a couple minutes and is high impact.

> Use a Grateful Journal to write 7-11 things you are grateful for each day (ideally after you read for 15 minutes in the morning).

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## Health

> Yellow bananas -- we have visual triggers around our office to encourage and influence behaviors. Yellow bananas, for example ,may encourage you to eat healthy during the day.

> Drink lots of water throughout the day to remain hydrated and reduce brain fog.

> *I recommend at least a late morning and mid-afternoon walk around your office, it can assist in clearing your mind, engaging with your team and increase your odds of staying physically healthy.*

> Loud noises, phone ringers, etc. can increase stress and anxiety - turn the volumes down.

> Make the investment in quality (functional) chairs for your team . . . we spend a lot of time at our desks and the quality of our chairs affects performance.

> Monitor your sleep habits, we all require various levels of sleep -- *I've found I perform better when I get at least seven hours of sleep each night - eight is great!*

> Talk slower, this helps to keep stress and anxiety levels down.

> Talk softer, be mindful of talking too loud.

> Walk slower, this helps keep stress and anxiety levels down. The inverse is also true, we end up creating waste when people are running around out of control.

> While some stress can be beneficial, too much of it can be detrimental to you, your team and your Firm -- it's crucial to monitor the stress level of your team daily and make adjustments as needed.

> Stock up on healthy snacks each week - eating better during the day can help boost performance. We stock up on bananas, nuts, blue corn chips and guacamole - our team can eat these for free.

> Take a day off during busy season to avoid burnout. *My favorite was a long weekend couples' trip to Spring Training in Arizona last March.*

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## Partners

> Control your calendar - be mindful of what you accept during the day - block time to accomplish tasks.

> Have Partners record billable time only, adjusting the focus to production instead of hours worked.

> If you come across a good teaching moment, have a quick, high-impact meeting with those who could benefit from it right away.

> It's critical to invest TIME in your team - pour into them and build a relationship.

> Set boundaries and know when to say "no" to things . . . leave at a set time, be at family events, etc. The are absolutes that go on the calendar.

> It starts with you, as Partners, we must lead by example on the journey to fixing busy season.

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## Planning

> Analyze what work can be done outside of busy season and put off the work that can be put off.

> Consider taking care of those clients you know you are going to extend in late January or early February, before the rush hits.

> Holding staff tax training in January instead of December has been beneficial in our team's learning retention.

> *I do a lot of tax planning from October until the end of the year - this helps in both client relationships and avoiding client surprises during busy season.*

> *I've found it advantageous to pre-schedule and space out my client appointments over the course of busy season to help smooth out the flow of work coming in.*

> Schedule and communicate client appointments in 30 minute and one-hour durations.

> Schedule appointments back-to-back (cluster booking), avoiding small gaps between appointments as the breaks aren't highly productive. *-- I've personally found this to be extremely helpful.*

> Schedule client drop-offs and mail-ins like you do regular appointments. We schedule the week we would like to drop-off/mail-in.

> Send out a tax letter to clients in late fall to highlight tax-law changes and various end of the year tax-planning thoughts and ideas.

> Stock up on Goodwill FMV Guides to give out to clients.

> The multi-tasking fallacy ... your conscious mind doesn't appear to be able to multi-task, staying focused on one task until completion is a key element to peak performance.

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## Processes

> Create tax quickfinders (cheat sheets) for items frequently looked up and provide to your tax team.

> Each year we gather post-busy-season feedback from our entire team regarding what went well, what didn't go well, and what we can do better.

> Encourage your team to give it "The College Try" for five minutes before asking someone a question.

> In most cases, we like to provide our clients with three pricing options to choose from: good, better and best.

> Make the most of your client meetings by being more future focused and talking about them instead of the previous year and tax documents.

> One of the main reasons clients switch accountants is a result of slow or no responsiveness - focus on improving your response time and clients will reciprocate.

> Our sweet spot for 1040 turnaround time (from when we receive it until it's ready for them to sign) is two weeks.

> Pre-bill clients and streamline the billing process as much as possible to save time during busy season.

> Purchase a Quickfinder Tax Guide for your team - it can be a really good source for finding those quick five-minute "College Try" answers.

> Keep your prices moving up each year, instead of larger one-time increases.

> Responding to staff timely is key in keeping them moving, it's one of the hardest things to do, but we've found it to be very rewarding.

> Set clients up on fixed pricing agreements, the client can budget a monthly amount and the firm can have automatic monthly revenue.

> Utilize online bill pay and credit card payment services such as Quick Fee to help speed up your billing and collection process.

> We customize excel spreadsheets for certain clients to make the tax preparation easier.

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## Processes - *continued*

> Utilize pool systems that categorize levels of work and then assign team members to work out of the particular pools based on their skill sets and expertise. We use basic, intermediate, and advanced pools for preparation and review.

> We've found it helpful to have most of the members of our team communicate with clients, rather than just Partners.

> We've found that the best way to learn tax is through repetition and exposure.

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## Team

> Add seasonal tax preparers and review capacity.

> Gradually ramp up busy season hours - easing our team and their families into busy season has proven to be beneficial.

> Hire Administrative help for Partners -- *I personally did this a few years ago and it has helped me out tremendously.*

> Hire Administrative Interns to help relieve the extra work put on your full-time Administrative team during busy season.

> Implement a no yelling or voice raising policy, with zero exceptions.

> *In an effort to push delegation, we started requiring team members to ask approval from me to work over 45 hours a week during busy season -- this forces the question of delegation.*

> The more hours your team works during busy season, the more hours they are away from their families - keep an eye on the disruptions to your team's family life and find the sweet spot of hours.

> Pruning your team . . . unfortunately, public accounting isn't for everyone.

> We don't talk about how many hours we work or hours in general, it's not a competition of "butt-and-seat" time, we focus more on results.

> Pay for personal services like lawn mowing, dry cleaning, etc.

> We have a dedicated tax team that is focused on the tax side of our firm.

> Have team members "ride shotgun" early and often, we've found early exposure to client meetings and observing leads to greater comfort in their own client meetings.

> Provide stretch opportunities for your team members during and outside of busy season, it helps them continue to grow and hungry for more.

> We are intentional about gathering feedback on preparers early on, share with them and make any necessary adjustments as needed during season . . .don't wait until the season is over.

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## Team - *continued*

> Watch the temperature of your office - if people need to move, get a fans or heaters - do it.

> We've been blessed to have a virtual office of team members who work for us from all over the country, both seasonally and full-time.

> We have tax buddies for our new preparers, who have a few years' experience. This gives them an opportunity to teach and it also reduces questions to Managers and Partners.

> We've found that giving accountants three to five of their own clients in year two really speeds up their growth trajectory.

> Give yourself something to look forward to at the end of the day.

> Familiarize yourself with Systems Theory and utilize it as a tool for managing your team.

> Don't bring in evening meals, it makes your team feel like they have to work in the evenings. It's worth evaluating how much productivity you actually end up getting vs. the cost of giving up personal time.

> Where people sit matters, be strategic in your seating arrangement.

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## Technology

> Being able to accept digital signatures is crucial to keep things moving during busy season.

> Digital organizers help increase turnaround time.

> Invest in a good client portal system and encourage clients to use it as much as possible, both for security and time efficiency reasons.

> This isn't as big of an issue in most places, but a good fiber connection can really have a positive impact on daily production.

> We try to set up the offices for our remote workers the same as they would be in a brick and mortar office -- three monitors, clean desk space, etc.

> Invest in scan and organize technologies to speed up time on front-end administrative time.

> Migrating our infrastructure to a hosted cloud environment has had a significant impact on our Firm.

> Our software allows us to link entity tax returns - this is a huge time saver.

> We found that a three monitor system works best for our team.

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## What Else?

Our hope is you'll be able to pick out a few things to help you and your firm move closer to a better busy season. We have additonal ideas we'll add later and continue to add the list, but we'd love your input, too.
If you have any ideas you'd like to share please send me an email at chet@sjhl.com.

You can start your list here!

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