CPA*Plus* Network
presents

Tax Season Sanity:
Time and Team Management During Tax Season

2019

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Introduction

Background

Tax season will always be chaotic, but the trend with small practices is that each year becomes more difficult. For some, it's an all-out blitz for three straight months. For others, it's more of a rollercoaster; February may start slowly, until suddenly out of nowhere, everything hits at once. From there, it's into survival mode, where the odds of having the time or mental energy to implement new initiatives or positive changes are slim to none.

The truth is, however, that we can make tax season much more predictable by controlling what is happening, when, how, and by whom. This leads to more energy (and therefore productivity), a better climate for all involved (owner, employees, clients), and ultimately, significant increases in revenue.

The most important question to ask: "Whose practice is this? Mine, or everyone else's?"

Learning Objectives

- Understand techniques for reducing conative stress, which leads to burnout
- Understand new techniques for controlling workload throughout the season
- Understand new avenues for getting team members involved in higher-level processes

Bringing Predictability to Your Schedule

Ideally, a *business should support the business owner,* but in our industry we find the “tail wagging the dog” instead.

Tax season throws us into a reactive mode; putting out fires, responding to requests from others, and being hit with new surprises—all while trying to dig through a massive workload.

The starting point for building your practice around you is to understand your natural instincts and how to work within your strengths. This is how we reduce burnout and increase our productivity and energy, which is crucial for a successful tax season.

Conation

Conative is one of the three parts of the brain (along with cognitive and affective). It drives our natural tendencies, impulses, and directed effort. In relation to the workplace, it explains how we prefer to *get things* done. When working outside of our instincts, we experience stress and strain, leading to burnout.

Four Conative Categories	My Conative
Fact Finder	____________________
Follow Through	____________________
Quick Start	____________________
Implementer	____________________

How can I use my conative as a tool?

Structuring Your Schedule

The First Step: Limiting Your Availability

Add up all of the distractions you get in a single day, then project it out to week's time, month's time, etc. It's astounding when you realize the inefficiencies, but consider the not-so-tangible effect; it drains you of your energy.

Our main sources of distractions during tax season include:

- Phone calls
- Walk-ins / Drop-offs
- Team Questions
- E-mails

We struggle with the above for several reasons: We know that they need to get done, we feel productive when doing them, and we can even feel we're doing a disservice to others around us when we don't drop everything we're doing to address them.

Although we will always have to eventually respond to requests, it's essential that we all have a period of time each day when we *do not.*

Notes

Structuring Your Schedule

This our starting point:

Identifying Peak Productivity Time

When should this be?

Peak Productivity Time

During this period of time each day, we do NOT:

- Answer or check e-mails
- Make or receive phone calls
- Allow interruptions from staff
- Permit walk-ins

What should I do during this time? **Get real work done.**

Instead of dropping whatever we're doing to cater to others, the ball should be in our court, instead. Consider the following procedures in addressing some of these sources of distraction outside of peak productivity time.

E-mails

By addressing e-mails throughout the day, we distract ourselves from the work at hand. Instead:

- Should only be checked 2-3x per day
- Schedule time for checking and responding to e-mail
- Turn off notifications

Structuring Your Schedule

Phone Calls

By dropping everything for client phone calls, we are costing ourselves time, productivity, and energy, while training clients in an undesirable way. Instead:

- Protective barriers necessary:
  - Receptionist
  - Automated System
  - Disabling of Ringer
- Clients should indicate their availability for a call back
- Schedule specific time to check and return phone calls (within 24 hours)

Team Questions

An anytime, open-door policy ensures interruptions, costing time and productivity. It can even “spoil” employees, stifling their growth and development. Instead:

- Schedule time when you are available for questions
- Each employee should learn to create contingencies for when you are not available—other projects, returns, etc.
- While you are unavailable, employees should understand who else may be able to help them, based on the nature of their question

Side note: Employees should understand that they should never come with a question unless they have a proposed answer, and reasons as to why—right or wrong is not important. What is important is that they are *thinking*, not simply relying on others.

Structuring Your Schedule

The Second Step: Block Scheduling

Once you get a handle on tax season interruptions and distractions, you can begin to implement block scheduling; setting specific periods of time for specific types of projects.

Block scheduling brings significant predictability to a tax season schedule. By pre-determining what types of projects you are focusing on and when, you can avoid conative strain and work with more energy and productivity.

The structure should depend on your conative index.

For example, the most common type of wiring in the CPA industry is that of one who leads in Fact Finder and Follow Through. Perhaps it looks something like this:

Fact Finder	Follow Through	Quick Start	Implementer
8	7	2	3

A fact finder / follow through draws the most energy (and therefore, productivity) when being able to focus on one thing at a time, as opposed to multitasking. Having to switch between different types of projects without finishing the current task at hand can lead to exhaustion and burnout very quickly—and that's not even including dealing with interruptions along the way.

A starting point for block scheduling might look something like this on any given day:

Before 8AM?	8AM-9AM	9AM-12PM	12PM-1PM	1PM-4PM	4PM-5PM	After 5PM?
	Answering E-mails Planning for Day / Week	Peak Productivity Time – Preparing / Reviewing Returns	Lunch Available for Questions	Client Meetings	Returning Phone Calls E-mails Available for Questions	

Structuring Your Schedule

Once you get a feel for a starting point, you can adjust from there. For example, you may want to expand your blocks of time into entire days:

	MONDAY	TUESDAY	WEDNESDAY...
BEFORE 8AM	?	?	?
8AM-9AM	Answering E-mails Planning for Day / Week	Answering E-mails Planning for Day / Week	Answering E-mails Planning for Day / Week
9AM-12PM	Peak Productivity Time: Preparing / Reviewing Returns	Client Meetings	Peak Productivity Time: Preparing / Reviewing Returns
12PM-1PM	Lunch Available for Questions	Lunch Available for Questions	Lunch Available for Questions
1PM-4PM	Preparing / Reviewing Returns	Client Meetings	Preparing / Reviewing Returns
4PM-5PM	Returning Phone Calls E-mails Available for Questions	Returning Phone Calls E-mails Available for Questions	Returning Phone Calls E-mails Available for Questions
AFTER 5PM	?	?	?

Though it may look different for each person, the most recurring theme is that **you determine your schedule,** not everyone else. Although it's not easy, there are times when saying "no" to someone may be the best thing for both you and them.

Collaborating on Core Work

CPA*Plus* Network has created an exclusive “cloud” system for its members, which allows them to exchange information within a secure environment.

Network members can:

- Collaborate on core work, regardless of geographic location.
- Eliminate the struggle of hiring well-qualified temporary / seasonal staff members.
- Expand firm capacity.
- Ensure all work gets done in the event of losing team members unexpectedly.