

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

family should have a say in some of these issues – like the very first one.

Gail Perry • Apr. 17, 2015



So, you've got another busy season behind you. How did it go? Better than in the past? About the same? A new level of disaster? While your busy season is fresh in your mind, this is the time to reassess as we take a breather and recap the past few months.

Here are some questions to address with your co-workers, and don't forget that your family should have a say in some of these issues – like the very first one.

- **Hours** – Did you work more hours this spring than in past busy seasons, fewer, or

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

management software. Are you using the best process for the money you are spending? Could you be more efficient with a better system? Now is the time to retrace your document footsteps and think about how you can improve the process. Our [reviews of document storage and document management systems](#) should help point you in the right direction.

- **Client Services** – Are you providing the right services to your clients? Think about that for a minute. Maybe you're going through the motions of doing the same thing for your clients that you've been doing for a decade or more. Is it time to restructure your service offerings so that your clients know what services you have to offer, what they will cost, and how they will provide benefit?
- **Client Communication** – What is the best way for you and your clients to communicate? You need to set the rules for how information will transfer between your team and your clients, keeping in mind what will be easiest and least off-putting for your clients. In a world of new technology, you might find yourself communicating with clients through email, social media, web chat, and text messages. It's imperative that you have a procedure in place whereby you can document and save important client communications.
- **Health, Hygiene, Appearance** – I'm not kidding – these are important too. Did you start to slack off on these key elements as the busy season days turned into weeks and months? Start working out a plan now for your whole team to make sure everyone is in top shape before, during, and after next year's busy season. And get busy now getting back to your best form!

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us