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Nov. 02, 2016

# TAX SEASON READINESS: WORKFLOW CHECKLIST

HOW CONFIDENT ARE YOU THAT YOUR FIRM IS PREPARED FOR WORKFLOW DEMANDS OF TAX SEASON?

	Not at all confident	Not confident	Confident	Extremely confident
We follow firm-defined workflow for tax processes with measures (or technology) in place to ensure the standardized way is followed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We schedule workflow.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff and partners will know at all times during tax season what they are supposed to be working on.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have the ability to schedule and manage staff and reviewers including their capacity of work, for any reason (e.g. bottleneck, resources available, due date at risk, cost, etc.).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assign work based on any factors (e.g. skills, expertise, client, staff pay, etc.).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We will know, in real-time, where each project is at.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have the ability to print directly from any tax software we use into your	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Tax season promises increased workload which tests the resolve of even the best-run firms. Call it ironic or perhaps even not fair; client expectations are at their highest at the time of year when your firm is saddled with maximum workload. Client satisfaction often hinges on the firm's ability to operate and deliver tax returns efficiently, making workflow a top priority.

Workflow is a firm function that needs to be continuously reviewed and improved.

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workflow software. When tax season is upon us and workflow matters most, Mendlowitz would agree, taking measures to ensure you have technology needed to follow these best practices:

- ☐ Reduce touches by streamlining processes
- ☐ Schedule work flow
- ☐ Schedule staff
- ☐ Schedule reviewers and assign the proper level of reviewer to each project
- ☐ Examine bottlenecks and don't let returns sit unattended
- ☐ Examine time spent preparing versus reviewing the return
- ☐ Measure productivity by preparer
- ☐ Make sure staff is clear on what needs to be done for each client

The first step to reduce touches and streamline processes, especially tax work, requires writing down every possible way the process is handled in your firm. The second step is to determine the most efficient and preferred way to handle the process then take measures to ensure this process is followed. This outcome is frequently referred to as the standardization of process. There is document management software and workflow software (e.g. Doc.It Suite) that creates a standardized process for tax and all other areas of work, while also providing workflow tools needed to ensure the firm is following best practices as defined by Mendlowitz.

For scheduling, examining and measuring best practices, workflow software may be needed. Now is the time to question whether your firm is equipped to handle some of the most common issues causing workflow problems during tax season. Our [Tax](#)

Season Readiness: Workflow Checklist will reveal your level of confidence in your

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