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TECHNOLOGY

De-Stressing During Tax Season

Alright, tax season is now officially here, the national chains have been advertising for a couple of months, nearly every individual filer has received their W-2s, and hopefully they're lining up in throngs for your services.

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[From the February 2007 E-Newsletter.](#)

Alright, tax season is now officially here, the national chains have been advertising for a couple of months, nearly every individual filer has received their W-2s, and hopefully they're lining up in throngs for your services.

February to mid-April is the busiest time of the year for many practices, even those with year-round write-up, bookkeeping or other services. In fact, for some practices, this two-and-a-half month window can account for 70 percent or more of their annual revenue. In addition to the stress that comes with servicing a greater number of clients (many of whom are new or confused or angry about the tax situation they've dug for themselves), the principals of small practices may also have the added stress of knowing that their firm's fiscal well-being depends upon this critical time. If something were to go wrong....

In addition to the key stress drivers above, a multitude of other stress contributors exist during this time of year.

Stress Sources

- New or difficult clients

- New tax laws/treatments
- Lack of sleep
- Expanded work hours
- Less time with family/spouse
- Technology concerns
- Practice's financial concerns

Stress Relievers

Of course, the best way to reduce the stress of tax season is to prepare for it in advance by implementing productivity-enhancing technologies, training staff on the systems, educating them on new tax changes, encouraging clients to prepare and meet with your prior to tax season, and more.

But what now? What can you do in the middle of February, or March or April? Here's a short list:

1. Take time for yourself. Although it may seem impossible to do, you need to schedule a recurring time a few times per week to take an extended lunch or break away from the office (one to two hours). What you do with this time is up to you, but don't do work. Instruct that only emergency calls be forwarded to you. Don't open your laptop, even for recreational use (you know that you'll end up checking e-mail and other work items). Also, if you routinely work late into the evening during tax season, reserve time to spend with your spouse, your children and even the family pet. Recommend these suggestions to your staff, as well, and support them in their scheduling requests.

2. Set achievable, yet growth-based goals. If you are still building your practice or looking to expand into new areas, this is the perfect opportunity to spread the news of these other services to your clients and, perhaps, to have them refer others to you. Of course, adding to your workload at this time of year is not the point, but setting goals and benchmarks can help you measure your progress during tax season. This, in turn, can reduce the stress of not knowing how the firm is doing, or of finding out too late that you could focus energy on other areas. Having daily or weekly goals can also serve to break the season into segments, and gives you and your staff something concrete to work toward. A tangible reward for meeting these goals is also a must, whether you're rewarding your staff or yourself.

3. Manage your time more efficiently. In addition to practice management systems and all of the other applications or services you've invested in to streamline your

time, it is how you use these systems that determines whether you will be more efficient.

4. Stretch. Get off of your posterior and take a minute or two to stretch. Remember to shake out those wrists, too. Nobody needs carpal tunnel at this time of year. If you have an exercise routine, try to keep it up even during tax season or you could get a little moody. For those without a regular routine, consider a short walk during your lunch break – sometimes a breath of fresh air can go a long way towards relaxation.

5. Sleep. Most American adults already deprive themselves of a good night's rest, and during tax season some professionals end up with only a few hours per night. Because this denies your body's daily attempt at recuperation, it can lead to less productivity. Working more hours and sleeping less hours does not necessarily result in more work done, and certainly can result in more errors.

Some Other Ideas

- Try to avoid eating too much junk food; it will slow you down.
- If you're addicted to caffeine or nicotine, now is probably not the time to quit without really stressing out and risking relapse.
- If you have a vacation planned for after tax season, keep a reminder of it somewhere visible from your desk. A little daydream isn't always a bad thing.
- Leave a camera out so that staff members can take pictures of each other (and you) while working. Everyone will get a few laughs.
- Encourage laughter in the workplace, whether sharing funny jokes, reading comics, hiring a singing comedic telegram, or other methods.
- If you plan on sharing several pizzas or other evening meals with your staff, encourage them to invite their family members for a brief time.

It Will Be Over Soon

It's amazing how fast it goes, but soon the season will be over and you'll be settled back into the more measured routine of your other practice services. We hope you and your firm have a productive and profitable tax season.

Remember, when you burn a candle at both ends, you get wax all over the place.

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