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packed everything I owned in a U-Haul truck, and drove to Washington D.C. I was so bold and happy. I had no job, no place to live, just a passion for whatever life had in store for me. I had no trouble finding a job. There were, in fact, several to pick from. And finding an apartment was just as easy. Every morning I started my day with enthusiasm and awe – how could I possibly be so lucky?

**Gail Perry** • May. 20, 2014



Many years ago, in a warm sunny May of my youth, I finished college (or so I thought), packed everything I owned in a U-Haul truck, and drove to Washington D.C. I was so bold and happy. I had no job, no place to live, just a passion for

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commentary you'll find in this issue along with a healthy dose of fresh starts and new beginnings.

### **May Checklist for a CPA Practice**

- If you haven't done so already, schedule a busy-season debrief meeting with your complete staff. Talk about what worked, what went wrong, and what you'd like to change or improve. Get some pointers from Lean Six Sigma Black Belt Roman Kepczyk on page 18, *LEAN Up your Firm's Tax Season Debriefing*.”
- Extend your debrief to clients. Prepare a client satisfaction survey to send to your busy season clients, requesting their feedback on how they enjoyed their experiences with your firm and asking for suggestions for improvement.
- Plan your extension schedule. The October You will be so appreciative if you set up appointments now for collecting data from all clients who are on extension.
- Consider a software update. Technology guru Dave McClure has the lowdown on Windows 8.1 in “The Ultimate Windows Update” on page 14. And if you serve nonprofits, be sure to read this month's reviews starting on page 6.
- Spring cleaning! Clear the desks, get the carpets cleaned, freshen wall art and paint scratched walls. Spruce up the grounds with lawn fertilizer, flowers in the beds, pots of plants outside and throughout the office, wash the windows. Think about dedicating an afternoon to cleaning and then have an office pizza party to celebrate!
- Freshen your website. Spring cleaning can go virtual if you take the concept to the web. Take new pictures of your office and staff, rewrite bios, update descriptions of your services and add new offerings. Work on site content to increase your YOUTility (see Kristy Short's article, “Are You a YOUTility?” on page 12). Use your knowledge of your clients to provide content that will connect with them, as described in Taija Jenkins' article, “How Content marketing Can Strengthen Client Relationships,” on page 13.

- Post sign-up sheets for community activities coming up in the months ahead.

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