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7 Staff Management Tips for the Busy Season

Tax season is tough on everyone, but managers need to make a special effort to watch out for the well-being of their teams. It's critical to prevent burnout and disengagement from jeopardizing morale and productivity.

Paul McDonald • Feb. 06, 2015



Tax season is tough on everyone, but managers need to make a special effort to watch out for the well-being of their teams. It's critical to prevent burnout and disengagement from jeopardizing morale and productivity.

Here are seven tips for managing employees — and keeping motivation up — during this busy time.

1. Ensure bench strength.

Make sure you have the right talent on board before the storm hits. Creating a dynamic mix of full-time employees and highly skilled interim professionals enables you to staff up or down based on workload demands all year long, and the benefits are particularly evident at tax time. In the process, you increase the job stability and morale of your full-time employees. [Working with a financial staffing firm](#) can take much of the stress away from the process of recruiting and hiring these reinforcements.

2. Monitor workloads.

Keep a close watch on how well your staffing strategy is working. If it appears employees are still struggling with sizeable challenges, it can significantly tax their endurance (pun intended). By continually monitoring workloads, you'll be able to spot drops in efficiency or a higher-than-average rate of error and take prompt action.

3. Identify roadblocks.

Think back to your previous tax season. Did your team spend excessive time on verifying the accuracy of late submissions from clients? Was there trouble at deadline time because a few returns that required follow-up had been forgotten? Did employee illnesses come at just the wrong time?

The list goes on. But the point is that avoiding past mistakes can be a motivator for your team, who won't need to wonder, "Didn't we just go through this issue last year?"

4. Delegate effectively.

Adding staff is not the only way to succeed in motivating employees during tax season. As a manager, part of your responsibility is to delegate tasks in a way that best addresses the needs of your busy periods. Assess the abilities and experience of your staff members to determine the best candidates for tasks you feel are appropriate for delegating. Then make sure the people you've identified are able — and willing — to absorb new work.

A word of warning: Tax season when the workload is especially heavy may not be the best time to test an employee's skills in a new area.

5. Promote teamwork and collaboration.

Employees' stress level will be reduced if they have a feeling that "we're all in this together." To promote this kind of team cohesion, establish periodic goals, such as celebrating completing the first 500 tax returns or reaching the halfway point in the work cycle.

Getting the team's buy-in is especially crucial when everyone is under intense pressure, so make sure all employees understand what the group goals are. Encourage information sharing and be willing to step in and help out if the team is short-handed.

6. Let staff know work-life balance is still an option.

Yes, it's possible for accountants to have a life outside the office during tax season. Be sure they understand that the goal is not to work to the point of burnout, which increases errors and jeopardizes customer satisfaction.

Encourage your team to take lunch outside the office and not to burn the midnight oil every evening or sacrifice entire weekends to work. To stem a high turnover rate among its young recruits and underscore the importance of balance, one CPA firm initiated mandatory office closings at 5:30 p.m. on Wednesdays and Fridays during tax season.

7. Praise and reward.

Publicly **praise the team** in company newsletters, through emails and at meetings. And don't wait to **reward your staff** for their hard work. Employees who know they stand to be rewarded for outstanding performance approach their jobs with greater enthusiasm and **creativity**.

*Paul McDonald is senior executive director with **Robert Half**, the world's first and largest specialized staffing firm. Over the course of his 30-year career with the company, he has spoken extensively on employment and management issues based on his work with thousands of companies and job seekers.*

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