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Taija Sparkman • Nov. 10, 2015



The end of the year is a busy season for payroll practitioners. It's filled with lots of year-end tasks and checklists, making sure your clients are prepared for the upcoming tax season. This is also why it's a good time to start planning your year ahead.

It may be tempting to wait until after Tax Day to think about your 2016 goals when all of the filings and tax notices are behind you. But, in doing so, you've already missed out on one-third of the year to accomplish any goals your firm set out to achieve. Planning ahead now also gives you the opportunity to forecast your firm's needs for the busy tax season.

Identify both your short-term and long-term goals for your firm. Create a plan for

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Will you hold a firm-wide campaign to celebrate the progress of certain goals or will a small team be responsible for quietly measuring metrics?

This is also a good time to access your tax season needs. If you think you will need more resources or staff to help you achieve your goals and serve your clients during filing season, now is the time to plan for the uptick. Determine how you will continue to process payroll for your clients and help them with filing notices. Identify any efficiencies in your current process and where there is room for improvement and build it into your business goal plan.

Assess your current processes and software. Are there any upgrades that need to be made in order to ensure you hit your goals? Invest in the needed technology now so that you can more effectively achieve the goals you have set in place. Examine the current tasks you carry out for clients and research the available technology to see if there is anything that will make you more effective or provide greater security.

Lastly, communicate with your firm and clients about your goals. Your staff needs to be onboard for successful implementation. Make sure they are able to see how the goals are best for your payroll practice, especially if they are particularly challenging to achieve. Other practitioners may be concerned that they cannot carry out the additional tasks required of them in order to help meet the firm's business goals. You'll also want to reassure your clients that any changes you make in attempts to achieve these goals will not interfere with the quality of service they are currently receiving. Clients may worry that a focus on growing your business makes them less of a priority.

Year-end is filled with forms and double-checking information accuracy, but it can be a great time to put the wheels in motion to start the new year off with a bang.

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