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Tax season is over – hallelujah. From my experience working with numerous accounting firms on their digital strategies, I know for a fact that a number of

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the usual routine without taking any action related to the pain we suffered. Don't let this year be the same! Use the post-tax season to take measured decisions on the future of your practice. As most things in life, your firm could benefit from some spring cleaning! So, without further ado, here are our 6 spring cleaning tips for the post-tax season.

1. Segment your clients

You may already be doing some segmentation within your client base. However, I'll ask you to look at your clients in this manner:

- a) Documents delivered on time and in order
- b) Documents delivered on time, but disorganised
- c) Documents delivered late
- d) Clients who only remember last minute
- e) Clients who were a complete nightmare and you definitely don't want to work with next season

Use this quiet time to decide how you will get rid of clients within the last category (e) or convert them into clients that you'd be happy working with.

2. Prepare yourself a schedule for next season

If you don't want to burn yourself out, start preparing now. Make a list of the following dates and add them into your calendar:

- a) When you would like to receive all the documents

- b) The date from which you will start applying surcharges for late submission

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If you don't have a practice management solution or software which will automatically handle client reminders, we suggest going into your newsletter software of choice and pre-scheduling the following emails:

- a) A first reminder email that the financial year will be coming to a close, and that you will be accepting completed documents as of the 1st of January. This should be sent around October-November, and it will also serve to remind clients that you've got their back.
- b) A second reminder, sent during the second week of January – nearly everyone is out on holiday during that first week. Here, you'll be listing in detail all the documents that you require from your client. Also list the dates we discussed above, to lay out ground rules.
- c) The third reminder should be sent around a month before the date by which you'd like to receive all the documents.
- d) A fourth reminder should be sent a week prior to the deadline.
- e) The next email goes out on the day of the deadline, clearly stating that this is the last day for regular returns – anything sent in after this date would imply a late fee.
- f) The final email goes out on your 'no more' day.

It is important to have these emails scheduled as early on as possible because, once you get to the busy season, you're probably not going to find the time to prepare and/or send anything according to the given schedule. It will also make sure that you don't deviate from the master plan.

4. Consider upselling & advisory services

Have a look at the list of business clients that you had classified as being disorganised

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situation better and, eventually and collectively, arrive to a solution that will improve their business and simply make your own life easier in the long run.

5. Think about technology

Let's have a look at your technology stack. Are you happy with the technologies that you are currently using in your business? Identify any shortcomings and plan ample time to test alternatives. I've seen plenty of questions crop up last-minute on social media from practitioners fed up with their current solutions, simply because they're just not doing what they need them to do. Now is the time to start investigating! You'll be running at full speed once the next tax season kicks in.

Also look at other tools which could help you out, but you might not yet be using – consider document-sharing solutions, or platforms that allow online submission of expenses and documents directly to you. These could be a great win! You may also notice that some of your clients will need to make a few tweaks and/or updates to be in line with your technology stack.

6. Shape your marketing strategy

So we've done a bit of a clean-up with your clients and maybe your technology stack. With some important decisions coming up, it's time to have a look inwards and a bit more towards yourself.

As part of your vision to not have to work Saturdays in the upcoming tax season, how much thought have you given to your marketing strategy? The way you position yourself and your brand is key to the kind of clients you attract – this, as you may know, is linked to a multitude of factors including the value you can give, the amount you charge and, most importantly, the time it takes you to serve the client.

I have seen accountants take the time to strategically pause and think, reset their

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This post-tax season, give a gift to yourself – the gift of living your own life. Here's a [work-life balance cheatsheet](#) to help you save precious quality time, all whilst sustaining the growth of your practice.

Jonathan Mifsud is the Chief Digital Strategist at Maze Digital and focuses solely on helping accounting practices with digital strategy and its implementation. He has over 7 years of experience in the financial industry, and has helped accounting firms break through the \$1M revenue barrier. If you want to stop giving business to your competition, why not grab this opportunity and hop on a [free strategy call](#)?

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