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Whew! Tax season is almost over — a time we know to be a particularly demanding strain on all our resources. For accounting firms with limited staff or that haven't kept up-to-date with the many recent revisions made to [tax legislation](#), it can be even more chaotic. As Colin Powell once said, the secret to success is the result of preparation, hard work and learning from failure. So with that spirit in mind, and as tax season winds down, consider these three tips to prepare your team for a successful second half.

### **Ensure you have the right team**

If you found yourself stretched too thin this season with client appointments, there's

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decrease ROI over time and do damage to your reputation. While it may save you a little up front, skimping on the right talent can actually end up costing you more in the long run. Currently, there's an all around need for finance and accounting professionals, with jobs in the sector, projected to **increase by 2.3 percent**, a post-recession high. And if you have your sights set on hiring, the usual lull right after Tax Day is an opportune time to onboard new recruits. With a little downtime, you'll be able to ease them into their new roles and allow them to get acclimated with the workplace before things pick up again.

If you're worried about the overhead associated with taking on a few additional workers, consider partnering with a reputable **staffing company**. You can hire on a contract-to-perm basis, and if you find the additional help is benefiting your firm, you can make a quick transition into a full-time employee (FTE). It will pay off in the amount of stress you can avoid and it's also less of a burden on you and your dedicated staff in the long run.

## Connect with clients throughout the year

As spring approaches, many firms will start preparing for April 30th, the **form 941** quarterly deadline for small businesses while also gearing up to perform midyear physical inventory analysis. Clients, especially first-time or small business owners, may not always fully understand everything required of them as their businesses grow. Make sure you're asking your clients the right questions and schedule follow-up sessions. Here are a few relationship-deepening questions to consider:

- What general ledger systems do you currently use?
- Describe the systems and financial reporting software your department utilizes. What are the challenges you face with your filing process?

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businesses operate and handle undisclosed client information — but don't wait until the last minute to discuss these new procedures all at once. Conduct monthly training sessions with your accounting staff so you can breakdown complex training topics into small, easily digestible units. Doing so will improve your efficiency over time as your team will have had enough time to absorb the new information and put it all into practice. This way, by the end of the year, they will have mastered any new policies that may have taken effect, and they'll be more able to work without error.

Remember, when it comes to accounting, preparation is key — and if your firm champions it, you'll attract clients that trust your brand and return year-after-year. Trust is a big part of handling a person's and/or business' finances, and the more that CPA firms can earn their clients' trust, the more referrals they'll receive and the more successful they'll become. Follow these guidelines and prepare in advance, and you'll be sure to be met with success in the second half of 2019.

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**Jodi Chavez is Group President, [Randstad Professionals](#), [Randstad Life Sciences](#) and [Tatum](#).**

*Jodi oversees the field organization and provides strategic direction for Randstad Life Sciences, Randstad Professionals and Tatum. With more than 20 years' experience in the staffing industry, Jodi's entrepreneurial drive and strong business acumen have enabled her to consistently increase revenues, grow profits and deliver ROI. Her breadth of expertise spans team building, strategic planning and execution, M&A, branding, social media and multi-generational leadership.*

Firm Management

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