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are your most important asset. Yet, a bad hire can drive away clients and poison morale. My team is important, and while I intentionally invest my time and money in ...

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All of us could benefit from sharing our firms' best practices, especially when it comes to having a productive tax season. Here are some tips that have worked for my firm regarding our team, clients, and workflow.

Your team: hiring, managing and training

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2. Discern if you need a person with little experience or 10 years' experience.
3. Create an organizational chart for this year and three years out.
4. Develop a career path that gets candidates excited to grow.
5. Post a job ad that attracts the right candidate and repels the wrong candidate.
6. Offer a referral fee for recommending a rock star.

In the tax and accounting world, most people would only look at skills, but what I've learned is that I also need to hire for attitude. In addition, people want to do work that matters.

To **manage** and train a team, you need to invest in people on a business and personal level. The investment is of time and having conversations is key. I recommend recurring meetings every week with each person on your staff. Weekly meetings help build a successful culture, improve the accuracy of work, and train the staff. Some good books on hiring, managing, and training your staff include:

- “**Clockwork: Design Your Business to Run Itself**” by Mike Michalowicz
- “**The Ideal Team Player: How to Recognize and Cultivate the Three Essential Virtues**” by Patrick Lencioni
- “**Who: The A Method for Hiring**” by Geoff Smart

Clients: communication, advisory, and paperless

No matter what kinds of processes you have, you need to consider how they will impact your clients. You want to make your processes easy, but you also want to make sure you consider any changes from your clients' point of view.

Here are some client best practices for consideration:

- Have a secure client portal. There are many good ones out there; Ex. **SmartVault**.
- Maintain an online software to text clients. Ex. **Jive**.

- Have clients fill out a payment authorization when they turn in their tax docs and

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Have you ever prepared a return where the client calls or emails saying, "Hey ... why do I owe \$2,000 more on my return? I got a refund last year. You must have done something wrong." If so, this is an indication that the client needs your advice.

We have some clients who only want their tax return prepared because they are W-2 employees, homeowners, and their situation has stayed the same for years. However, we have other clients who see the value in taking that tax return and using it as a tool to project and strategize on their situation.

At our firm, we have created a roadmap for our clients to follow:

- The Essentials track is where we keep them in compliance with the IRS; this is a transactional service.
- The Premium track is where we can transform their situation, providing them tax savings and business growth. In fact, [advisory](#) is where we focus on our time and energy, not just at tax time, but throughout the year.

Your workflow: internal process, billing, and paperless organizer

Accountants by nature are detailed, an important trait when noticing the numbers don't look right on a tax return. But, being detailed can also be a curse; we can make things more complicated than they need to be.

[Streamlining workflow](#) is very important. For example, instead of chasing down W-2s from our clients, our tax pros only prepare the returns and meet with clients.

In addition, we require all clients to fill out an organizer, engagement letter, and payment authorization. Paperless organizers make it easy for our clients. If it's not easy, they won't do it. For years, we have used a PDF fill-in doc, but for tax year 2020, we are moving to an online organizer that we hope will make things easier for our clients.

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worldwide award, "Top 15 Firm of the Future." AdminBooks has transitioned 100% of their bookkeeping clients to QuickBooks Online and converted their tax clients to a paperless cloud system. Renee is also the author of "Your Financial Flight Plan: Pilot Your Business to Profitability." In her book, she demonstrates in a creative way the reasons why every business owner needs to be a better manager of their business. Born and raised in California and happily married since 1990, she is the mother of two sons, lives her life with purpose and thrives on helping her clients do so as well.

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