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TECHNOLOGY

7 Tips to Prevent Tax Season Burnout

Busy season is exactly the time of year you need the best software the most. Technology can potentially help you work faster with fewer mistakes—and thus decrease your stress.

Andrew Argue • Mar. 05, 2021



It's tax season and you've got plenty to do. Burn out could already be happening, but you've got a long way to go before April 15. This time of year, you likely have higher stress and are going to experience some fatigue. What can you do to prevent hitting the wall? Consider these tips.

Lower Distractions

Having work interruptions is never a welcome thing, but interruptions during tax season can be especially frustrating and a catalyst to burnout. Of course, there is a higher volume of client calls and emails this time of year. It's best to delegate activities that pull you from your primary work or set aside a specific block of time each day to handle those distractions.

This way, distractions are limited and they don't knock you off track throughout the day. Turn your phone off, don't open emails, and put a "Do Not Disturb" sign on your door—whatever it takes to lower interruptions and become more productive in the limited hours you have to work.

Hire Help

Whether it's just you or your entire staff that's feeling overworked right now, a key way to prevent burnout is to hire more help. For some, that just sounds like more stress—but if you know exactly what you need and have a good hiring process in place, then now is the time to get that extra assistance. You may not find full-time support now that we're in the thick of tax season, but you can supplement your team with third-party outsourced firms as well.

Longer hours and heavier workload are normal during tax season, but hiring either full- or part-time help—even temporary help, can reduce the impact across your firm, lessening the burden on everyone.

Take a Break

Be looking for signs of burnout before it's too late, both for yourself and your employees. If need be, take a day off and completely disconnect. While taking a full day this time of year can seem far-fetched, some believe that a personal day off allows you to recharge so much so that you can make up for it in the days that follow.

If taking a day off as you approach burnout isn't an option, try limiting your hours on certain days. Too much overtime isn't good for anyone, no matter what time of

year it is or how important the work. Make sure you leave the office at an early enough hour to unwind and get some rest before bed.

Decrease Time Per Tax Return

If you can organize requests, questionnaires, engagement letters and payments into one organized system, it can really speed up your production. Many firms have unnecessary delays in sending and receiving signed documents, delays in processing payments, no structured onboarding process and wait until the last minute tax deadline for all files which causes a massive spike in workload.

Come up with a system and use available technology to have an all-in-one place for these documents and requests to help you stay organized and on track. You can use tax preparation questionnaires that have tax planning questions embedded so you can prepare two services at once and this will also help you with your off-season workload. The more you can automate data collection and deliverable creation, the more quickly you can service clients and increase your firm's revenue. So focus on innovation, which will in turn reduce time spent per return.

Stay Appreciative

This may seem silly, but no matter how much work you've got on your plate, the right frame of mind is to be appreciative of the work. With the economy the way it is, many are out of jobs or having a tough time. Meanwhile, some accounting and tax professionals are swamped with more work than they can handle. In short, burnout is a problem, but at the same time, it's a good problem to have.

So, take a moment each morning to be thankful for the mountain of work in front of you. Having an attitude of gratitude is a natural stress reliever. This also goes for the atmosphere you create inside your firm. Tell your employees how thankful you are for their contributions. Words of appreciation and thankfulness can go a long way towards relieving tension during a busy season.

Eat Well

Most of us are pretty aware that eating healthy foods can impact energy levels. Likewise, eating too much sugar, fast food or less than ideal choices can lead to feeling sluggish and tired. That's why it's important, for example, to keep raw vegetables and fruits on hand as opposed to boxes of cookies or candies. You might pre-pack a healthy lunch from home so you don't feel the need to swing by your local burger joint when you become hungry in the afternoon.

For many, dietary choices tend to get more chaotic the busier they get. This is why it's important for tax professionals to make it a point to eat well even while they're swamped with work. The better you eat, the more clear-headed you'll remain, which makes it easier to get through the work. Letting your diet slip during your peak time of year is a recipe for burnout.

Leverage New Technology

For many, tax season seems like the absolute worst time to even consider investing in a new software program, but if you get the best technology on your side, it can definitely speed up your workflow. Whether it's tax preparation, client collaboration or tax planning software, tools like these exist to take stress off of your firm by automating processes. If you have outdated technology, this is likely a cause of stress for your employees, and an upgrade would be a big relief.

Busy season is exactly the time of year you need the best software the most. Technology can potentially help you work faster with fewer mistakes—and thus decrease your stress. So, if you haven't already, do some research on the best software out there for tax and accounting firms, and then get started.

All these tips, taken together, can collectively help alleviate your stress, prevent burnout and help you become more profitable this tax season. You'll still likely experience some fatigue—because it is tax season after all—but that doesn't mean you have to hit a wall. Take care of yourself and your firm with the above tips, and April 15 will be here before you know it!

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Technology

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