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Meeting

The next two months offer great opportunities to research, acquire and pilot new tools and processes so they become the new firm standard before the September and October deadlines. Below we outline 10 tips to optimize your post-busy season debrief ...

Roman Kepczyk • Apr. 19, 2022



Another tax deadline is in the history books garnering firm members a well-deserved break before transitioning into “extension” mode. This small respite is actually the best time to hold a tax season debrief meeting to not only recap the firm’s successes but also to identify opportunities for production improvement.

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2. **Include Everyone:** We believe it is important that everyone participate in the process, even if is only completing a survey. This includes all administrative and remote personnel, contractors, and interns as these personnel often have unique insights. In particular, we have found valuable the input of newer personnel and those that have worked in other firms as they may not have been “indoctrinated” in the firm way of doing things.

3. **Ask Open Ended Questions:** While one of the primary reasons for conducting a debrief meeting is to identify opportunities for improving production processes, it is also a chance to identify and reward individual successes, as well as capture employee perceptions. When surveying firm members, we have found asking “What went well this busy season and why” will garner more provocative thought and insight than asking “was this busy season better than last year.” Below we list eight additional questions that we suggest firms consider when surveying firm members either live or via a digital survey tool such as Survey Monkey or Question Pro.

- What was the best improvement from last year?
- What tax processes did not go well and why?
- What technologies or applications hindered the process and why?
- What should we do better or differently this extension season?
- What areas did we have staffing shortfalls or need additional training?
- What team member went “above and beyond” or did something special?
- What client returns were awesome this year and why?
- What client engagements were difficult and why?

4. **Identify Opportunities:** One situation that can completely derail a debrief meeting is when a dominant personality interjects at the beginning of a discussion and effectively shuts down everyone else from participating. Having each person first write down their responses to the questions either via the survey or individually on “sticky notes” during the meeting will allow everyone to get their thoughts

captured. We then ask the “newest” meeting participant to share their response and

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touch/technology, and (C) those that have a low impact but high touch/technology. Most often the (A) items would be prioritized first and the (C) items shelved. Amongst the (B) items we normally compare them based on expected ROI and shorter timeframe for evaluation and successful implementation (often based on other peer's successes).

6. Create SMART Projects: We suggest firms select only a few projects out of the prioritized items and make sure that adequate resources (staffing and budget) are allocated so they can be successfully completed. To best ensure success, we recommend firms write “SMART” project charters so everyone thoroughly understands what the goal/outcome of the project is. SMART stands for: Specific, Measurable, Attainable, Relevant, and Time-bound. For instance, “beginning July 1, administration will scan in/merge all physical and digital 1040 source documents and utilize a firm-standard bookmarking application and OCR'd into the tax program which will be QC-reviewed to a firm standard for onscreen preparation” is more comprehensive than “utilizing up-front scanning.”

7. Understand the Process: Once a project opportunity is targeted, we have found it is extremely helpful to flowchart the current process on a whiteboard so everyone understands visually what is currently occurring (including warts and bottlenecks in the process) and to then to compare solutions that positively transform the process, streamline steps, or eliminate those bottlenecks. To ensure that everything is captured, we have firms compare it to any firm written procedure document and even physically walk through the production process when there is significant input from different firm members.

8. Research Solutions: May and June provide great opportunities to inquire peers, do web-based product evaluations and to attend industry conferences. Professional Associations such as the AICPA and CPA Firm Management Association conduct tax

technology surveys and hold conferences where attendees can evaluate these

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perspective but also evaluating the impact for any clients or outside users. The process should be thoroughly documented and flowcharted so that it is clear as to what is being done.

10. Implement/Educate: After a successful pilot program, the process should be rolled out including providing education on why the change was made and the benefits expected to the firm and clients. In my experience, this is often where firms under allocate resources and can significantly hinder the introduction of a new solution. Whatever you believe you need in training, we suggest you double it and ensure that everyone is effective at utilizing the tool/process.

Conducting an annual tax debrief meeting will provide an opportunity to not only acknowledge the successes of the previous few months but also launch enhancements in the firm's tax production processes. Getting everyone's input and successfully implementing a new solution that they had input on also helps to build a culture of teamwork and firm improvement.

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