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FIRM MANAGEMENT

Are You Constantly Putting Out Fires at Your Firm? Here's What to Do

Implementing communication policies, setting expectations, and balancing your workload can help minimize the stress on your team and prevent future problems.

Christopher Hayden CPA • Sep. 21, 2022



If you're like many firm owners, you spend a lot of time putting out fires. Between deadlines, staff needs, client needs, and the constant looming threat of the Great Resignation, there are *many* fires to fight right now.

But as a firm owner, it's your responsibility to battle these flames. Within that responsibility, however, there is also the opportunity for positive changes to keep some of these fires at bay.

Here's what to do if you're constantly putting out fires at your firm.

Get the Right People, Processes, Systems, and Technology in Place

Getting the right people in the right seats and implementing the right processes and technology can help things move along much more smoothly at your firm.

- **Implement an overarching management structure** that will work for your firm and *support growth*.
- **Find ways to streamline your processes, workflows, and procedures** to ensure that deadlines are met and the quality of your work is consistent. Here's where technology can come into play to automate processes and tasks. Automation will save time while creating a positive client experience and ensuring that you're building a scalable firm.
- **Create a knowledge transfer plan** to make onboarding new staff easier.

Implementing systems, processes, and technology takes time and may require training, but the results are well worth the investment. These structures will help eliminate common hiccups in your firm's workflow and reduce the number of fires you have to put out.

Having the right people in the right seats and the right management structure will simplify the problem-solving process so that issues can be addressed sooner rather than later.

Also, be sure to build in accountability and feedback loops.

Prioritize Communication and Take a Proactive Approach

Lack of communication is a big part of the reason why firm owners are constantly putting out fires. Prioritizing and taking a proactive approach to communication can help.

- First, make sure that everyone is on the same page and understands what's expected of them. This rule applies to both your team and your clients. For example, clients should know when their documents are due each month.
- Implement clear communication policies so that clients know when your team is available. Without clear policies about your working hours, clients may expect you to be on-call 24/7.
- Be upfront and honest with clients. If a client is asking for a quick turnaround time and your team's plate is already full, be honest. Let them know that while you cannot get it done as quickly as they'd like, you *can* get the job done by X day.

Implementing communication policies, setting expectations, and balancing your workload can help minimize the stress on your team and prevent future problems.

Fires are Inevitable – Focus on What's Most Important

Even with clear communication policies and the best processes and technologies in place, fires will be inevitable. Problems will arise no matter how diligent you are in trying to prevent them, and it's your job as a firm owner to tackle them as efficiently as possible.

When problems arise, focus on the most important ones first. In most cases, problems aren't as urgent as they may seem. Focus on those that truly *are* urgent first. Often, it's okay to move things around – as long as you communicate these changes with all parties involved in the project (your client and your team).

To minimize future fires, block off a few hours on your calendar every week to work on the important issues related to reducing fires and growing your firm.

Invest in Training and Education

Your team is your greatest asset, so invest in them. Continued training and education mean that your team will be better equipped to prevent or handle issues and keep things running smoothly.

Don't overlook the importance of training on soft skills. These are equally important in preventing and resolving issues with clients.

Reflect and Take Action

Taking a moment to step back and reflect can help you improve and refine processes and systems, so that you're spending even less time putting out fires.

Perform reviews quarterly or even more frequently if you can. Ask:

- What's going well?
- What challenges are we facing?
- Where can we make improvements?

For challenges and issues that you identify, it's crucial to find the root cause of the problem. Addressing the problem at its roots will help you overcome it rather than implementing temporary solutions. For example, if your team is overworked, perhaps you have taken on too many clients. Should you hire more staff, raise prices to reduce demand, or take another approach? Perhaps you need to let go of your most difficult clients. By addressing the root cause of the problem – too many clients – you can effectively reduce your team's workload.

Putting out fires is part of the job as a firm owner. However, if you're constantly battling the flames, consider implementing the tips above. You'll save your team, your clients and yourself a great deal of stress and time.

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