

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Gail Perry • Oct. 10, 2022



If you share a home with someone, or even if you live alone, you likely hear, or ask, this question frequently. Unless you have planned and shopped for your meals in advance (as accountants, that concept is not foreign to us), you might find yourself turning to your go-to list of family favorites when it comes to dinner plans.

For me, it's spaghetti (my mom's recipe), tacos (a throwback to my college days), chili (that's when it's my husband's turn to cook), chicken stew, vegetable soup, and a few others. A big advantage is that I can usually count on finding all the necessary

ingredients in the freezer and pantry, so there's no last-minute running to the

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

tomorrow, and on and on.

Instead, it might be time to think like the meal planners who work out their week in advance, decide to try some new recipes, shop for the necessary ingredients, and add variety to the daily menus.

We can start with a bigger picture – what do you want to accomplish (or cook!) that you haven't tried in the past? Is it improving your skills? Adding a new service line? Reaching out to new potential clients? Updating your work-from-home policies? Cutting back in order to have more free time? Adding staff? Starting a client newsletter?

All of these seem like major tasks and thus often they get set aside and we stick to what we've been doing on a regular basis. In order to make a change in your business, consider breaking that change into small, manageable steps. I was moderating a webinar recently about adding CAS (Client Accounting Services) to an accounting firm, and the response from attendees was that the concept of adding a service line was overwhelming. Webinar participants cited problems like, our traditional partners don't want to change, we don't have the right staff, we can't find the right clients, we don't have the right technology in place. Confronting that list of problems was causing people to back away from adding the services even when they believe it would be good for the firm to do so.

Advance planning (the menu), knowing what's needed to add the service (the ingredients), and then setting up a step-by-step plan (the recipe), and assigning someone who will be in charge (the cook) is the way to get any large task accomplished. You may notice that this equates to the concept of a formal business plan, and that in itself might seem overwhelming, but you can create a plan much more easily when you think of what you want to accomplish in terms of the small tasks that make up the whole.

Adding small tasks to your daily project list is much easier than trying to deal with

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved