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prioritize tasks, leverage technology, plan for complex projects and streamline meetings can go a long way in ...

John Graziano • Feb. 01, 2023



For many accountants, we have times of intense, long work hours followed by slower periods. However, with the average accountant working **longer hours** during the busy season, it's easy to go from a 40-hour week to one that is 60 – 80+ *hours*.

If you want to minimize time spent in the office or working virtually, you need to work on your time management.

The following tips will help you master your schedule to finish work faster and have

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day

- Break larger tasks into manageable chunks

One trick that works well is color-coding your tasks. You can use *red* for urgent tasks, green for tasks that are non-urgent, and so on.

2. Leverage Technology to Streamline Tasks

When surveyed, **58%** of accountants state that technology helped them *improve* productivity *and efficiency*. If you strategically leverage technology, you can save so much time. A few options to consider are:

- Moving to cloud-based solutions to take work home with greater ease
- Automate any tasks that you can, such as sending client reminders
- Using time trackers to better understand how long each task takes you
- Learn software shortcuts – really

If you have the right tech stack and solutions in place, you'll save time during busy season and well beyond.

3. Keep Meetings Brief

Can your meeting be an email? Meetings eat up a lot of time, and it's one of the top complaints among workers. It's challenging to remain on-task and timely when you're in meetings multiple times daily.

If you need to have meetings, follow these guidelines:

- Create an agenda prior to the meeting
- Keep meetings to a minimal amount of points
- Time meetings strictly

- Review and cancel meetings if they're unnecessary

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4. Block Off Time for More Complex Projects

Some projects and tasks are more complex and require more research, concentration or calculating. If you know that a project or task is going to be more in-depth, block off time for it. Be sure to turn off notifications during this time and limit any other distractions.

Setting aside a bigger chunk of your time for these projects will allow you to work on them uninterrupted.

You can also consider using time blocking as a regular habit. For example, you could set aside 30 minutes every morning to work on emails, followed by reviewing returns for an hour, and so on. Having set periods of time to complete various tasks will help you avoid task hopping and focus on the task at hand. A lot of time is wasted trying to jump between various tasks.

5. Don't Forget to Take Breaks

It's tempting to try and tackle every task on your list without a single break. But taking this approach is a recipe for burnout.

Instead, take short breaks regularly to give yourself some time to breathe. A quick break may be just what you need to feel re-energized or solve a problem that's been stumping you all morning.

Try to take your breaks away from your desk. Go for a 10-minute walk outside. Grab a cup of coffee from the break room, or do some stretches in your office.

Allow yourself some brief time to recharge, and you can return to work feeling a little more refreshed.

6. Plan Time for Interruptions

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between tasks. Another approach is to overestimate how long it will take to complete a task.

Creating your schedule with interruptions in mind will help you feel less stressed when an unexpected phone call comes through or a team member needs help with a task.

To add to this, your staff and clients will have questions. In addition to planning for interruptions, I recommend adding time to your calendar that is dedicated to answering client and staff questions. Do your best to field questions during this time, while also knowing that questions outside of this dedicated time block are bound to arise.

The Bottom Line

Mastering time management is crucial for every accountant. Learning how to prioritize tasks, leverage technology, plan for complex projects and streamline meetings can go a long way in making your day go more smoothly. But don't forget to take breaks and plan for interruptions because days may not always go as planned.

Following the tips above can help you get more done throughout the day without feeling too stressed or overwhelmed.

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