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break afterward and allow everyone to recharge for the more hectic times ahead.

**Joeseeph Graziano** • Jul. 12, 2023



Summer is a nice break from the busy season when staff often work **55 – 58** hours a week and partners often push 80+ hours. You'll find that work is slower and you may even struggle to keep your team busy.

Seasonal fluctuations are a part of life in accounting, *but* don't let this downtime go

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points. Summer is a good time to:

- Reach out to clients to see how they're doing and reevaluate their pain points both in business and in their personal life
- Ask clients how the first half of the year has been and if anything has changed since you've last talked

Your clients will appreciate you touching base with them and you may uncover that their needs have changed a *lot*. For example, your client may have decided that they want to invest in real estate that went on the market and was positioned perfectly for them.

In this case, you can start working on tax planning to help them save as much money as possible from the investment.

You should also use these talks with your clients to spot trends that you may have overlooked. If many clients are struggling with their cash flow or financial plans, use this information to add advisory services in these areas.

You may even need to level up your team's skillsets to meet your client's needs better, which brings me to my next point.

## Level Up Your Team's Skillsets

You've learned a lot during your conversations with clients, but now it's time to level up your team's skillset to ensure that they have the skills necessary for both the current advisory services you offer and any new services or roles that you need to add.

Training also helps keep team members fulfilled because they'll be:

- Challenged to grow

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## Reassess Your Workflow and Tech

Could you have done better during the busy season? Could a change in your workflow and tech have led to an enhanced client experience? These are questions best asked when you have slower work periods because the answers will lead to key changes in your workflow and processes.

A few things to consider are:

- **Tech bottlenecks.** Review the past few months and see where tech can be integral to freeing up time and improving client satisfaction. Perhaps you can make a client portal that allows clients to upload and download documents rather than emailing your staff dozens of times with new files to upload.
- **Standardize processes.** Are your client experiences in disarray and *not* standardized? When you add new services, it's easy to find yourself in this situation. You should review, revise and even create new standard operating procedures so that the client experience is the same across clientele and done the *same way every time*.

If your standardized processes are working well, there may be no reason to change them. You may also find that your tech is spot on and no adjustments are necessary. However, a routine review in summer is a good way to ensure that you're offering your team and clients the best experience possible.

## Take a Break

Finally, it's summer and you deserve a break. One thing that always helps me improve my firm is to take a step back, reset and recharge. Accountants work long, arduous hours that can make you feel like you're running on empty for most of the year.

Take a much-needed break and allow yourself some time just to rest.

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downtime seriously at the start of the season, you can even take a break afterward and allow everyone to recharge for the more hectic times ahead.

## Joe's Bio

Joseph Graziano, CFP® is the Vice President and Wealth Management Partner at [FFP Wealth Management](#). Through FFP management, Joe and his team help manage over 2.4 billion in assets. FFP Wealth Management has served the unique needs of the accounting community for over 28 years and was formed out of dire need for accountants and financial planners to join forces in providing premium services to their clients.

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