

Time management tips

Get the most out of busy season

Time is a luxury in public accounting. During the busy season, precious resources go into preparing and reviewing returns before the deadline. Maximizing time in the office can help improve how your staff operates.

Map out your day

Plan your day by scheduling the most demanding tasks during peak productivity hours. Recognize cognitive strengths and align tasks accordingly to maximize productivity and reduce interruptions. It is essential to find a schedule that works for you.

Leverage software integrations

Take advantage of various software integrations. These integrations allow you to streamline your work processes, making your life easier. One way to do this is by using scheduling apps, which make scheduling appointments a breeze. Automating administrative tasks using different tools can simplify your workflows.

Improving your firm's use of automation is best when done outside of peak workload times. Trying to set up new tools during hectic periods is less effective. Installing these tools and training your staff before the busy seasons is best to achieve optimal results.

Eliminate tedious tasks

The hardest part of time management during the busy season is navigating the busy work. Tax returns still need to be prepared and reviewed before they're filed. By outsourcing tasks like this, you can eliminate the need to occupy your staff with time-consuming work.

Set appropriate boundaries

Clear boundaries between work and personal life helps maintain a healthy work-life balance.

- ✓ Start by setting specific working hours and adhering to them
- ✓ Create a structured, balanced schedule that prevents burnout
- ✓ Manage your phone and email usage
- ✓ Have specific times for responses and turn off notifications after work hours