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Capacity Planning Tips for Tax Season

1. Set Early Deadline Groups

Lumping all tax returns into March and April destroys your capacity. Group your clients by complexity and set earlier deadlines for business returns. Moving 30% of your work to February spreads the load and prevents April chaos.

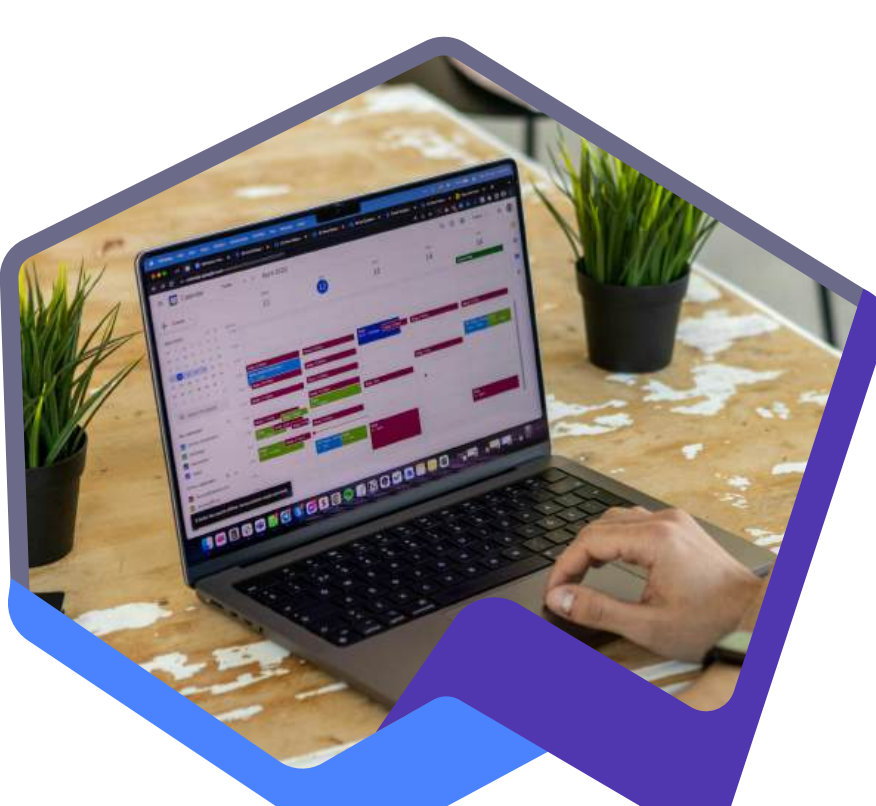


2. Embrace the Power of "No"

Learn to say no strategically. Set clear boundaries with clients about when you need their information and stick to them. Empower your team to protect their Focus Time and push back on non-critical interruptions. Remember, every "yes" to a low-priority request is a "no" to meeting your most important deadlines.

3. Create Client Tiers

Every tax client demands attention, but some deserve more of your limited capacity than others. Once you've created your tiers, stick to them. When tax season pressure hits, your complex clients are paying for additional time—give it to them.



4. Automate Your Client Scheduling

Choose tax practice management software that allows clients to book appointments, includes time buffers between meetings, and sends automatic reminders. This ensures clients can schedule within your availability while you maintain control over your calendar.

5. Staff to Your Peaks

Seasonal tax work requires flexible staffing solutions. Analyze last year's busiest weeks to determine the extra help needed, combining full-time staff with freelance or seasonal preparers, reviewers, and front desk support.



6. Build in Buffer Time

Tax season always throws a few curveballs. Build in buffer time to handle them smoothly. Start by pinpointing where things tend to back up—maybe it's during reviews or that final filing push. Add extra time at those stages to give yourself some breathing room.

7. Leverage Cloud Practice Management Software

In the midst of tax season chaos, cloud-based practice management software can be your firm's secret weapon. This powerful tool helps you optimize resources, streamline workflows, and deliver exceptional client service, all while keeping your team connected and in sync.

