



AMY BALL

Sustainable Methods for Surviving the Busy Tax Season

How do you survive busy season? While chocolate and coffee *might* help, we wanted to bring you more sustainable methods of surviving the season.

There's nothing better than sharing stories, advice and tips, so we went straight to your peers who work in tax to find out what they do to cope with what is usually an incredibly busy four months. The accounting professionals who responded have served or are currently serving on Intuit® [Accountant and Advisor Customer Council](#). I loved reading all the tips members shared; they certainly are an intelligent group. Collectively, Council members have hundreds of years of experience and their firms range in size from sole proprietors to mid-sized firms.

Here's what they had to say:

Technology Saves You Time

Wendy Knutson, Knutson CPA:

Delegate, delegate, delegate. I've implemented a process this year for staff to intake, scan and enter basic info on the tax return before I see it. I've also delegated coordinating and following up on 8879s. Little time savers make a big difference.

Wendy also goes to the gym and eats healthy.

Joshua V. Azran, Azran Financial APC:

Scan everything. As soon as documents arrive in the office, scan and catalog them along with the rest of the tax files. This process allows us to know that nothing can ever get "lost in the shuffle."



Richard L. Craig, 415 Group:

Over the 20+ years that I have been in public accounting, “tax season” was always a 3 ½ month period of time where you spent significantly more time with your co-workers than you did with your family – weekends included. However, over the past 3-4 years, the improvement of technology, auto scanning and a good paperless system now lets me be just as efficient at home as I am at the office. All of our partners have virtual private networks (VPNs) from their home to the office with machine set-ups that are identical to their office. The last tax season, barring a few meetings, I was able to get home and have dinner with my wife and children every night. After they went to bed, I would go to my office and work the rest of the hours I would have normally spent at the office. I have the same access to every workpaper, prior year return and program that I need and was able to do it without any interruptions.

The only other tip I would share is to still get out of the office every day for lunch if you can. I used to work through lunch just to try and get more work done, but I now realize that I am much more efficient after clearing my head and getting out of the office for a while. Lunches are also great times to network with bankers, attorneys, referral services and clients so you can continue to build your business by selling even during tax season.

Jo King, Automated Only:

I support clients remotely as much as I can. I saved 2 hours today and was thankful for the extra time!

Keeping Healthy – Mentally and Physically

Beth Boyd, Beth Boyd CPA:

I work 7 days a week beginning January 3. For the last several years, I have taken off the weekend after Valentine’s Day and the weekend after the March 15 deadline. I tried “taking days off” and staying in town, but I always ended up working. Now, I force myself to get on an airplane and go somewhere (preferably with a beach involved) for these two weekends, plus the Monday after. I know accountants are not supposed to take any vacations during tax season and people think it’s a little weird, but these 2 breaks have not hurt my business AND have saved my sanity.



Marsha Brooks, Marsha Brooks, CPA PC:

For me, surviving tax season is about mindset. Any technology enhancements or changes are made well in advance of the start of the season. This include preventative maintenance on all the equipment.

My tips include:

- Work with the people I enjoying working with. This includes clients and team members. It doesn't make sense to work with people that constantly drain me of energy or are rude and demanding.
- Between my "first" and "second" shifts, my dinner break includes getting outside for a brisk 2 mile walk. Just long enough to clear my thoughts and refresh me for a couple more hours of desk time. Along those lines, I still get out once or twice a week for a longer hike in the desert or a cycling excursion.
- I give myself blocks in the day where I don't meet with clients, take phone calls or look at Outlook.
- I remind myself that this is just a season – a certain number of Saturdays and I'll be done.
- This year marks my 26th tax season. I wouldn't stay with it if I didn't find it rewarding. Not always fun, but rewarding because of the people I get to connect with.

Ron Wolfe, Wolfe Accounting and Tax, LLC:

I usually start off like gangbusters, but after about 2 weeks of long days, I start getting grouchy (my wife says I do). I do not work Sundays. I need at least one day to unwind and relax. I also do not work past 8 pm. You need a good night of sleep to get focused for the next day. We sometimes get silly and rock out to some music, get up and dance, sing, and do something completely out of character.

Stephanie McGuire, McGuire & Associates:



I keep a rigid sleep schedule – in bed by 10:30 pm every night and up by 6:45 am every morning

Anita Robinson, Synergy Tax & Accounting Inc.:

- First of all, I do not see clients on the weekend or in the evening. I only make house calls to my over 80 clients because I really don't want them to drive.
- The last few years I have scheduled a lap swim at least once a week. I put it on my calendar and my clients know that I have to leave, and my phone verbally reminds me of my appointments. I have gotten some really cute voicemails – “I know you are at the pool right now, but can you call me when you get out?”
- I also just leave for a run in the afternoon if it's not raining. Even a 30-minute run is enough to clear my head ... OK, a good run music list helps.
- At least once a week I take line dance lessons. These are also on my calendar.
- At time I have occupied myself with something completely different like building a dollhouse, you know – the kind with individual shingles to put on the roof and ‘hardwood flooring.’ Quite the brain teaser. One year I took French lessons; another year I took Spanish.
- My clients think it is great that I do this other stuff that has nothing to do with taxes. They really like my exercise routine and even encourage me by not chatting forever, but leaving early.

James Larson, James P. Larsen CPA:

No matter how busy I am, I always take at least 30 minutes of my day to exercise. It helps me relieve stress and stay focused.

Working *Your* Way

Jennifer Borges, Balance Books:



Any new or existing client who produces their documentation after February 1 is automatically told they will have to file an extension. Setting expectations is as important for clients as it is for the bookkeeper/tax preparer. By setting expectations, you take the pressure to meet unrealistic deadlines off yourself, and if you are able to complete the job before the tax deadline, your client will be pleasantly surprised that you were able to get the work done more quickly than promised.

In addition, use this year to structure your calendar for following years. Keep “tasks performed lists” this year organized by client, and then by month or due date within the month. Record everything that transpires in each client’s “accounting life” this year and use it as a road map for future years. It’s another expectation-setting exercise – if you know what’s coming, you can prepare the client ahead of time, and that minimizes “crisis accounting.”

Tina Callahan, Hunter & Associates P.A.:

I review all tax returns after hours so there’s no client interruption, no phone calls and no walk-ins. I also take off one weekend a month so I stay fresh.

Motivating Your Staff

Teresa Mueller, Mueller & Associates CPA:

- Fridays are a “jeans day” for everyone and the office closes at 5 pm.
- Once a week we hire a masseuse for chair massages.
- We have season tickets for all staff to a local arena football team.
- We have a home cooked dinner brought in each evening.
- We hire two interns from the local community college to work during tax season.
- We quote a minimum fee to “pre-qualify” the tire kickers.
- No one is allowed to work past 10 pm.



About the Author

Amy Ball is on the Partnership Marketing team to bring awareness of how QuickBooks Online integrates with companies, including American Express and Apple. She has worked in a number teams at Intuit, including Communications, Accountants and Apps marketing. When not working, Amy enjoys supporting small businesses of all types and talking with them about their daily adventures.

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