



PCPS MARCH 2008 BRIEF

Making the Best of Busy Season

It's March, and CPAs are heading into the home stretch toward the end of busy season. By this point, many firms have used up their initial energy surge and are soldiering on under the weight of hard work and long hours. If you're searching for ways to relieve stress and bring new motivation to firm members, here are some inspiring ideas.

Have a good meal. Many firms bring in free snacks, lunches or dinners for hard-working staff members to show their appreciation for their efforts and make their lives easier. Some of these meals may be eaten on the run, but it's a nice idea, too, to try to gather a group every week or so to relax together and enjoy each other's company. Theme nights — Mexican, Chinese, Italian — complete with decorations can also help to create some fun and restore spirits.

Treat yourselves. Implement stress reduction ideas such as in-house chair massages, yoga or exercise classes, "nap rooms" where sleep-deprived staff can recharge, and in-house exercise equipment. Employees also often work better—and are more satisfied—when they are not distracted by the day-to-day needs of their personal lives. To resolve that problem, some firms bring in help to run errands, such as picking up dry cleaning or dropping off prescriptions.

Recognize accomplishments. Many firm members take on added responsibilities or make sacrifices during busy season in order to keep work flowing smoothly. Acknowledging their efforts can inspire these hard-working professionals and encourage others to emulate them. The recognition can range from a personal thank you to a gift card for a movie or dinner out — and a mention of the accomplishment in the firm newsletter or during a staff meeting.

Get out of the office. "I embrace any and every opportunity to meet clients in great environments, particularly the outdoors, if it works for both of us," says Peggy Ullmann, of Ullmann & Company in Phoenix. That might include lunch or coffee in an outdoor café or even an early morning or late afternoon hike with a client or colleague to discuss business concerns. In colder climates, practitioners can find a quiet corner in a coffee house in which to catch up on work or meet with a client. Encourage staff to set up shop outside the office whenever practical, as well, so they can use the change to recharge their

batteries.

Multitask. Exercise can reduce stress and restore energy, but it's often difficult to fit into a busy season schedule. Ullmann has solved that problem by affixing a tray that will hold her laptop onto the front of her treadmill. She can now check e-mails or do research while working out.

Don't forget to join in. While considering ways to make life easier for staff, remember that firm leaders should also take time out for the firm's impromptu parties or exercise opportunities. It will help keep them refreshed and reinforce the firm's commitment to a less stressful working environment.

Set smart limits. Proper planning is a great way to ensure that next year's busy season runs smoothly. The members of Rigby Financial Group avoid working any weekend or evening overtime during the season by taking some smart steps before it begins, according to Eric Rigby. For example, if clients have not sent in their materials by the end of March, they are automatically moved to extensions. In addition, the New Orleans-based firm has made an effort to shift from individual to corporate clients. "When you are managing fewer relationships, busy season is less stressful," Rigby says. Finally, he avoids difficult clients who are temperamental or overly fee conscious. "The stress of busy season is not just a matter of hours, it's also the client demands," he observes.

Whether it's a matter of catering a fiesta or bringing in a masseuse, there are many options open to firms that want to lighten the mood during the last weeks of busy season. It's not too late to implement these ideas or some of your own inspirations to make the rest of the season more manageable.

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