

# Busy Season personality profiles



## 11<sup>TH</sup> HOUR LEAVERS



### Personality traits

Having had a busy year already, you expect busy season to live up to its name. You are worried about how the next couple of months will play out, with pressure points and long days ahead.

You anticipate having to chase problematic clients multiple times – and expect there to be some data arriving at the 11th hour, perhaps with some late submissions.

You have some concerns about staffing levels, readiness, or stress levels, especially as lockdowns mean adapting how you work together this busy season.

As a result of last-minute work, you expect invoices will be issued late and may not be paid until February, March or beyond.

## SQUEEZED MIDDLE



### Personality traits

Neither totally unprepared nor expecting to breeze through, you sit somewhere in between. Feeling the strain of a challenging year and not as ahead of the game as you would like.

You have made some contact with clients but know more will be needed, and fully expect there to be issues further down the line with certain clients.

There are some digital solutions in place, but you feel there might be more efficient ways of working or handling workflow.

Plans are in place, but urgent client demands coupled with team resourcing mean this is still likely to be a literal 'busy season'.

## STAR PERFORMERS



### Personality traits

Your behaviour is exemplary and you started communicating with clients in plenty of time, probably with automated emails and shared systems to make life easier.

By assessing what has worked well for you or problem areas in previous years, you have a strategy in place, and you are reviewing that regularly and finetuning.

Digital solutions are a core part of your practice and you plan to embrace software and tools to get your through busy season.

You are working ahead of yourself, perhaps even incentivising clients to submit info early, which means you are able to issue timely invoices and get paid quicker.

## Our tips

- 1 Pull a busy season strategy together** sooner rather than later – looking to past experience for a steer on how to improve.
- 2 Get client communications out quickly**, identify who will need more help and incentivise them to get moving.
- 3 Consider solutions to help you make up for lost time**, like digital tools that speed up client interaction, and outsourcing if you need more help.

## Our tips

- 1 Stay on top of workload** by using decent practice management tools to monitor workflow, assign tasks and hit deadlines - ease stress on the business and staff.
- 2 Take the time to troubleshoot** by looking at past problem areas so you are less likely to face last minute problems, for example common filing mistakes or leaving it late to contact HMRC.
- 3 Bill promptly as you go**, taking steps to protect your own cashflow through busy season.

## Our tips

- 1 There is always room for improvement!** Are all your team competent at using the tools you have and are there any workflow areas that could be automated to make life easier?
- 2 Double check you are up to date** with elements like accounts checklists, procedures, software and licences.
- 3 Check in with staff**, especially in this challenging time, to assess their how they are managing and their mental wellbeing.

Where do you fit?

No matter where, we can help.

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