



White Paper

# How to Keep Your Staff Productivity (and Motivation) High During Your Busiest Time

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QuickBooks. It's about time.



## How to Keep Your Staff Productivity (and Motivation) High During Your Busiest Time

*Alison Ball heads up Intuit's UK Accountant Programmes. Drawing from her own experience in practice and from countless interviews with accounting practices in the past seven years at Intuit, she provides practical tips you can employ during your busiest season to help keep productivity high and staff feeling valued and motivated to give their best.*

### The Background

**Self Assessment Season is upon us in a big way. Your team is working harder than ever, dealing with last minute clients, tracking down missing documents, and just processing the heavy workload in order to meet the 31st of January filing deadline.**

How can you keep everyone productive and motivated at this crucial time of the year? Drawing on our experience working with accounting firms over the past 20 years, we came up with this list of Top 10 Things you can do to increase productivity and keep staff happy and motivated.

Your first step is to identify and then minimize the distractions in a way that makes your staff feel valued and can actually motivate them to go that last mile for you. Once you have identified the distractions, and decided which things you will change moving forward, consider beginning your work day with a quick meeting to outline the targets for the day. During this meeting you can remind people of the things you expect them to do to help meet the deadlines, and get their feedback on what is working and what is not, so you can adjust as necessary. Doing this sets the tone for the day, and helps everyone feel like that they are moving towards a shared end goal.

To help you get started, we have broken some common distractions down into several categories... client-driven, environmental, and human-driven. And we provide tips you can consider implementing, to deal with each in a way that helps keep everyone happy and productivity high.

## First, we'll cover client-driven productivity stoppers.

### THE PHONE

***Is the phone ringing non-stop and are your staff answering it each time? A ringing phone is a good thing, but not if it prevents your staff from getting things done on time!***

#### **Productivity Tip 1 – Don't answer the phones between certain hours**

Several firms reported that they have significantly increased their staff throughput by having everyone change their voice mails to something like this “thank you for calling Accounting Firm XYZ. You have reached the desk of \_\_\_\_\_. I am currently working on your file in order to meet the Self Assessment deadline, but I will return calls between the hours of 11:00 and 12:00 and then again between 4:00 and 5:00. Thank you for your patience.” Doing this gives everyone a break. They can process returns during the non-answering hours, and then call clients back during the promised call back hours. Clients like this because they know when you will call (just make sure you stick to the promised call back times!)

#### **Productivity Tip 2 – Answer a voice mail by email**

It is even better if you can answer the client's question by EMAIL. This takes what could be a lengthy and often chatty call (it is a client after all, and you want to make sure you keep that friendly relationship going) and turns it into a concise email. “Hello Tom – I got your voice mail, and the answer to your question is \_\_\_\_\_. Please let me know if you have any more questions, and thanks for calling me!” Clients don't mind this, because they get the answer to their question (often on their mobile phone), and you are giving them a way to ask more questions if they need to. Once you have answered an email three times though, pick up the phone. Email is good for quick exchanges, not so good for lengthy discussions.

## **THE PHONE** (cont'd.)

### **Productivity Tip 3 – Create template emails for all common questions**

If you are answering voice mails via email, you can garner even more efficiency if you create template emails for the answers to commonly-asked questions during tax season. The idea here is that if you find yourself typing out the same answers over and over, it probably belongs in a template email. You can then quickly tailor the content to the client's individual question at hand, and save all that typing time. If you use Outlook, you can easily save an email as a template. See the end of this document for how to do this. But if you don't use Outlook, you can still save your email copy in Word, and copy and paste into an email whenever you need it. Either way, you wouldn't believe how much time this can save during your busiest season.

## **CLIENT PAPERWORK**

***What about key client documents? Clients are sometimes very last minute, and a tax return can come grinding to a halt if a key piece of information is missing.***

### **Productivity Tip 4 – Hire a seasonal worker or university student to chase down those missing documents**

The idea here is to not bog down your staff with tasks that can be done by someone more junior, or even someone with no experience at all. Hiring an articulate and pleasant person to do the chasing down can make the difference between a lot of tax returns prepared per day, or just a few. Maybe one of the staff has a son or daughter home for the holidays who could work from a list prepared by staff each day, and politely call the clients who have not sent in their documents? One firm reported that they actually send that person out to collect the documents in person, adding a nice personal touch. The courier also delivers cookies baked by the firm owner's wife, but that might be taking it a bit too far. Whatever approach you take, though, you'll be surprised at how much people's productivity soars if they are actually able to sit down and complete returns without chasing down missing documents all afternoon!

## Next, we'll cover environmental productivity-drainers.

### **NOISY OFFICE...**

***Some people work really well in a noisy environment, while others do not.***

#### **Productivity Tip 5 – Adapt the aural environment to everyone's needs**

Try and find out what works best for each staff person, and then adapt the environment to their needs. You don't have to give each silence-loving person an office, but you can buy noise-cancelling headphones, or even just those foam construction earplugs that come individually wrapped, and encourage people to use them. You can also play light music, and encourage everyone to make phone calls from a conference room or closed office. The music helps discourage people from talking to each other, while the absence of phone calls helps people concentrate on their work. Plus it is more pleasant than listening to people type all day!

### **COLD OFFICE/HOT OFFICE...**

***People cannot work productively if they are too hot, or too cold.***

#### **Productivity Tip 6 – Adapt the temperature to everyone's needs**

If the office is too cold: This one comes up frequently whenever we speak with accountants who work in older buildings. They report that they are just freezing, and they find it very hard to concentrate when they are cold, so they get up for frequent cups of tea and to move around to get warm again. This can be fairly easily solved (as we did in the Intuit offices) by buying small heaters to go under each desk. You would be surprised how many fewer cups of tea we get up to make because our feet are now toasty warm!

If the office is too hot: This is a bit trickier. Usually it is someone in the office who is cold, and that person controls the temperature, making it too hot for everyone. The solution here is to agree on a temperature that works for everyone, and then leave it there. And give that "cold" person a heater for under their desk.

## Finally, we'll cover human-driven distractions.

### FOOD AND DRINK

*People need to eat and drink during the day. How can you make the most of this in a way that not only adds to productivity, but keeps everyone feeling good?*

#### Productivity Tip 7 – The big teapot...

Buy a big teapot and make tea regularly during the day. Seriously! Create a rotation for which person brings it around a couple of times in the morning and a couple of times in the afternoon, to give everyone a cup at their desks. (Also bring the milk and sugar). This keeps everyone hydrated and caffeinated, but stops everyone going and making their own cups of tea and chatting while they wait for the water to boil (often leading to a much longer time away from their desks than you would like). Make the big teapot a fun part of tax season – maybe the firm owner brings around the tea and makes everyone feel honoured and special?

Another option is to have a constant boiling water tap installed in your office. Some firms have done this and they enjoy the benefits of shorter tea breaks year round! The best part is that if you choose to do this, you can still bring around the big teapot whenever you want.

#### Productivity Tip 8 – Bring in lunch

When you are really busy, consider bringing in lunch for the team. Yes it costs money to do this, but how much work time are you losing by having everyone go out for lunch? Most people are delighted to have the boss buy them lunch, because it saves them money, and they are happier to work through lunch rather than stay late and miss dinner with their families. Just be sure to adhere to the relevant employment laws surrounding overtime, and make this an optional thing just in case a staff member really values his/her time off during lunch. But overall, and done in the right way, this can be a productivity enhancer AND a morale booster.

## TIMED BREAKS

***Human bodies aren't designed to sit all day. But you don't want everyone moving around at random times and interrupting everyone else's thought processes and work flow. Solve this with timed breaks built into the regular work day.***

### **Productivity Tip 9 – The activity break**

Studies have shown that most people can sit for about two hours before they start to feel antsy. With this in mind, try and build in a 10-minute activity break a couple of times a day so that people get up and move around. If you have a sports-minded person in your firm, ask them to lead the breaks. If not, then just ask everyone to get up and walk twice around the office. It will feel strange at first, but people will report that they feel better, and they can work harder and longer after having regular “get up and move around” breaks.

### **Productivity Tip 10 – Treats for everyone!**

Ok – this isn't really a productivity tip, it is more of a morale booster. However, people who feel appreciated by their employers don't mind going that extra mile when the job demands it. One fun way to do this is to have unscheduled surprise “treat breaks”. Sneak in home-made cookies, or a cake that you have baked, (or buy them from a good bakery if you are pastry-challenged like some of us are) and gather everyone for a mandatory 15 minute meeting at 3:00 pm. Everyone will think there is a serious thing to be announced. But instead, you have cake and plates and something nice to drink, and you simply thank everyone for their hard work and hand out the treats!

You can also do a low-calorie “popcorn huddle” as well. Ring a bell at an unexpected time in the afternoon, and have everyone join you in your office for popcorn you have just popped (this is easy to do if you bring in a popcorn machine or use microwave popcorn packets). You can also use the time that people are gathered together eating to give encouraging reports on how many returns have been finalized to date.

## Bonus Productivity Tip

### *Gather your employees' feedback for next year*

Once the self assessment filing deadline has passed (or, once you have filed all your client's returns, if you happen to finish early), it is time to gather what worked well, and what didn't work, for next year. Capture your employees' feedback on the following items, before their thoughts turn to their next assignments.

- What worked well (continue doing for next year).
- What did not work (stop doing next year).
- What we can do differently (start doing next year).
- Which clients need to be put onto financial management software (like QuickBooks), to help them track their expenses properly next year.

**Document everyone's feedback and make a commitment to make next year your best yet!**

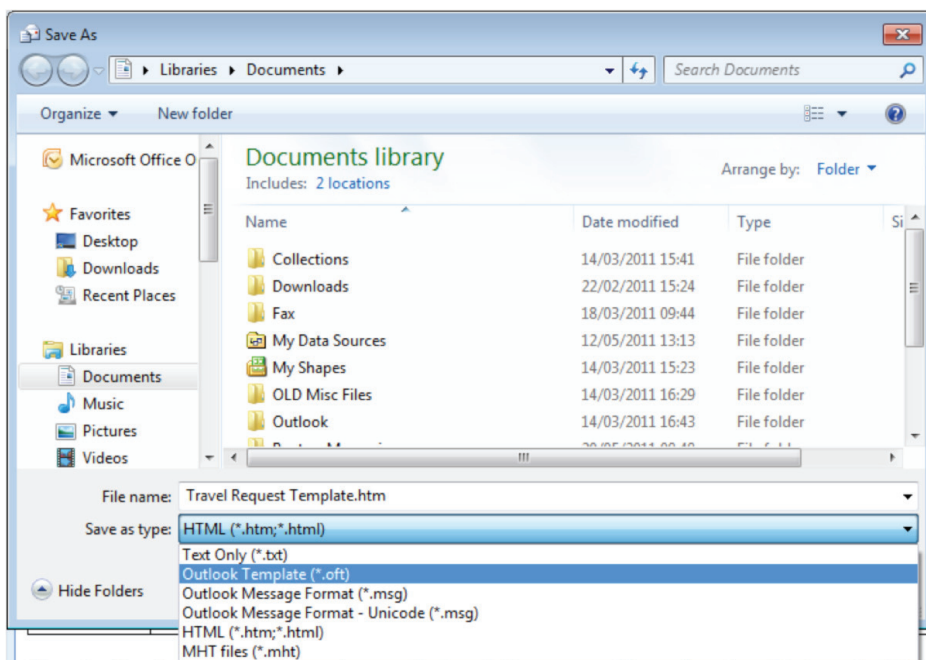
## Bonus Section: How to save an email as a template in Outlook



Click on the windows button and choose 'save as'

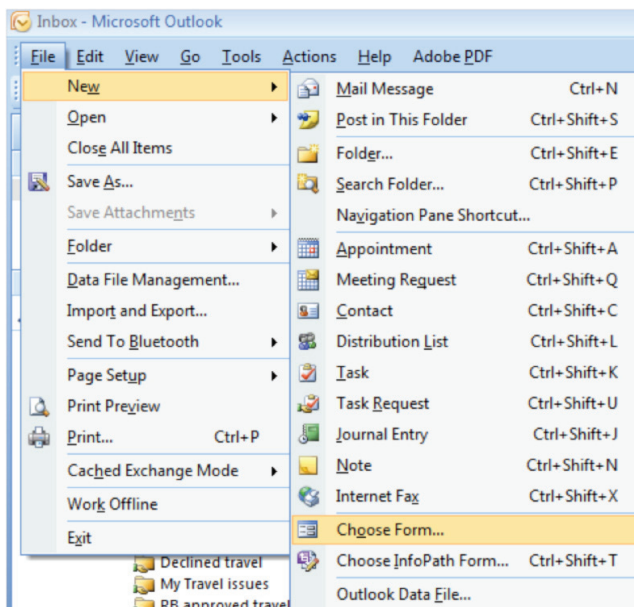
Using the drop down menu change the "save as" type from 'HTML' to 'Outlook Template (\*.oft)'.

Without changing the location press 'save.'



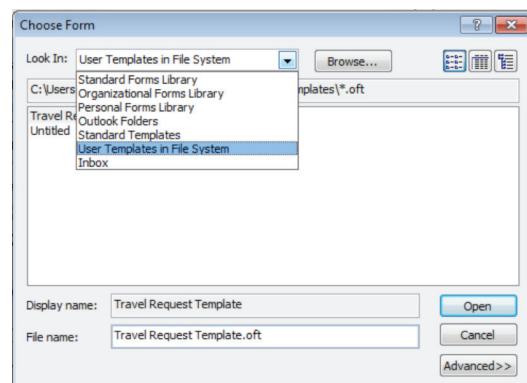
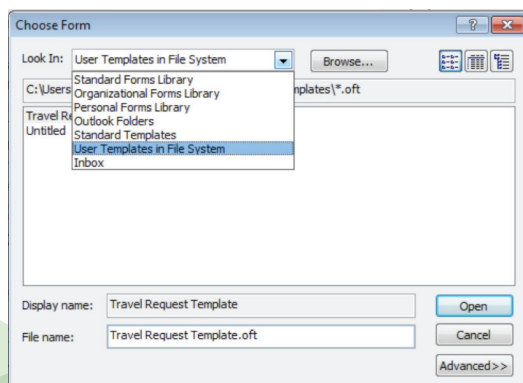
## To use the template:

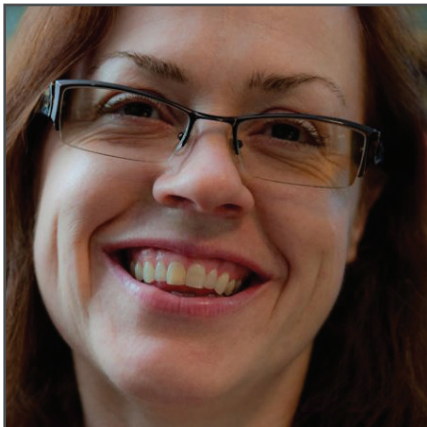
Open a new email by choosing 'file', 'new' and then 'Choose Form'



In the drop down menu 'Look In' choose folder named 'User Templates in File System'.

Click on the email called (in this example) 'Travel Request template' and open.





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Alison Ball heads up the popular QuickBooks ProAdvisor Programme for Intuit UK. This programme is ideal for accountants who wish to provide superior service to their QuickBooks clients or, who wish to grow their practices by adding QuickBooks to their service list. A good accounting system like QuickBooks will help your clients keep better business records and can even lead to a more productive tax season next year.

Additionally, many accountants have reported they save a lot of money using QuickBooks, because Intuit allows the accountant to set up 99 company files for just one software license fee.

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