

BUSY SEASON BALANCE

Practical strategies to protect
energy and reduce stress



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INTRODUCTION

Tax season can be a source of stress, but it doesn't have to lead to burnout. In this guide, Dawn Brolin, chief executive officer, Powerful Accounting Inc., shares practical strategies to help you burnout-proof your busy season.

You'll discover how to identify hidden inefficiencies, establish clear boundaries with clients and use automation and delegation to your benefit. These methods will help you create systems that boost capacity while facilitating client satisfaction.

This guide is for firm leaders who want to support their teams and team members aiming to reduce stress. You'll find ways to ease overwhelm, sharpen focus and build a healthier approach to the busiest time of year.



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WHY BUSY SEASON IS BROKEN

Understanding why busy season often feels chaotic is the first step toward change. By recognizing the key issues that lead to burnout, you can begin to reshape your approach and foster a healthier work environment.

Issues

- **Reactive work:** constantly resolving urgent issues for clients rather than proactively planning
- **Manual tasks:** engaging in repetitive tasks that could easily be automated
- **Poor boundaries:** working late, on weekends or taking on too much for clients
- **Neglecting health:** ignoring both mental and physical well-being

Effects

- **Culture:** stress affects everyone, lowering overall morale
- **Retention:** overwhelmed staff leave or become disengaged from their work
- **Sustainability:** the firm faces challenges in growing and maintaining quality over time



RECLAIM YOUR TIME

Time is your most valuable resource, especially during busy season. By auditing your workload and strategically planning your tasks, you can uncover hidden inefficiencies and make intentional choices that help you take back control of your time and energy.

Step 1: Audit your workload

Purpose: Identify major time drains before they become overwhelming.

Key questions to consider:

- Which tasks take up most of my time?
- Are there clients or projects that demand a disproportionate amount of my energy?
- Which repetitive tasks can be streamlined or automated?

Tip: Keep a log of your time for one week. Even minor insights can uncover significant opportunities for improvement.

Step 2: Strategically plan your workload

- **Tier your clients:** Organize clients based on their complexity and deadlines. Determine which ones require more hands-on attention versus those that follow a standard workflow.
- **Set timelines and deliverables:** Clearly communicate deadlines to both clients and staff.
- **Allocate focus time vs. client time:** Set aside uninterrupted blocks for tasks that require deep focus to minimize distractions.

Ongoing mindset: Focus on how you manage your time throughout the year instead of just trying to catch up during busy periods.



Step 3: Use tools and reflect

Consider: What's one thing you could stop doing this busy season that doesn't benefit you or your firm?

Useful tools for time reclaiming:

- Project management
- Communication
- Scheduling

Important: Reclaiming your time demands intention. Start by auditing, planning and selecting the right tools.

Key takeaway:

Conduct a thorough audit of your workload to identify inefficiencies, strategically plan your workload by tiering clients and clearly communicating deadlines and use tools to help reclaim your time.



WORKING SMARTER, NOT HARDER

In today's fast-paced world, working harder is not always the answer. Embracing automation and effective delegation empowers you to streamline processes, allowing you to focus on higher-value tasks that truly drive success.

Automate whenever possible

Automation helps you save time for higher-value work as well as reduce errors. Here are some key examples of automation:

- **Document management:** automated filing, templates
- **Client intake:** online forms, automated reminders
- **E-signatures:** reduce manual back-and-forth

Tip: Start by automating one high-volume, repetitive task this busy season for immediate benefits.

Delegate without losing control

Consider Dawn, who automated proposal and payment invoicing. This change saved her team up to 120 hours. Here's a simple framework for effective delegation:

- Assign tasks based on skill set and availability
- Clearly communicate expectations and deadlines
- Provide necessary tools and templates to ensure success

Mindset shift: Focus on the tasks you can handle and delegate the rest.

Accountability and mindset

To be effective, you must change your approach. You can't do everything, so focus on higher-value work. Establish accountability systems by:

- Monitoring progress on delegated tasks
- Scheduling regular check-ins with your team
- Using dashboards or project management tools for oversight

Main point: You can't buy more time, but you can manage it more effectively.

Key takeaway:

Embrace automation for repetitive tasks and delegate effectively to focus on higher-value work, ensuring that you're maximizing productivity without sacrificing quality.



MANAGING STRESS AND ENERGY

Recognizing the signs of stress is crucial for maintaining your health and productivity. By identifying personal stress triggers, you can take proactive steps to manage them, helping you and your team navigate busy season with resilience and clarity.

Identifying stress triggers

What client demands and last-minute requests consistently add to my stress levels?

Am I stuck doing repetitive manual tasks or putting in long hours?

Are my boundaries too loose, leading me to work late and on weekends?

Is the absence of clear systems creating chaos and overwhelm in my work life?

Energy protection strategies

Am I effectively batching my work and taking focused breaks throughout the day?

Have I introduced any micro-habits that contribute to my overall well-being?

How often do I practice self-compassion and mindfulness in my daily routine?

Am I making use of delegation and automation to help lighten my workload?

Benefits of managing stress and energy

- Greater focus and productivity
- Improved client experience
- Reduced risk of burnout and stress-related health issues
- A healthier team culture that boosts retention

Key takeaway:

Develop a proactive approach to managing stress by implementing self-care practices, maintaining open communication with your team and recognizing your limits to preserve energy during busy season.



REDEFINING BUSY SEASON SUCCESS

Success during busy season isn't merely about meeting deadlines — it's about creating a sustainable and fulfilling work environment. By redefining what success looks like, you can cultivate a mindset that values well-being and achievement in equal measure.

Automate whenever possible

- Avoid viewing busy season as "survival mode"
- Focus on what matters most
- Encourage proactive vs. reactive planning

Build sustainable systems

- Implement processes that extend beyond tax season
- Explore automation options
- Establish delegation frameworks
- Create standardized client workflows
- Assess the effectiveness of current systems for predictability and efficiency
- Identify areas where stress can be reduced through better systems

Team involvement and ownership

- Involve your team in decision making and planning
- Clearly assign responsibilities and empower accountability
- Foster a collaborative approach to increase engagement and retention

Call to action

- Identify one system or mindset change to implement this year
- Encourage taking small, intentional steps toward sustainable success
- Set a time frame for reviewing progress on these changes

Key takeaway:

Shift your definition of success from simply surviving busy season to creating a balanced and productive workflow that supports personal well-being and client satisfaction.





CONCLUSION

Busy season doesn't have to result in burnout. By making intentional changes now, you can create a more balanced and rewarding busy-season experience for you and your team in the future.

Interested in more takeaways? Experience the on-demand webinar: [Burnout-proof your busy season.](#)

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