

A less taxing busy season

CPAs share stress-relief tips for surviving the January-through-April race

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As the calendar chugs toward Dec. 31, many people will welcome 2020. But for CPAs, there's an ominous note to the date: it marks the start of "busy season," when the January-to-April race to file individual and many corporate tax returns starts in earnest.

In a kind of reverse hibernation, CPAs will have to face the prospect of putting in workweeks that last 60 hours or more, often rising in the dark and returning home long after sunset. But some accounting firms are trying to inject a bit of cheer into the dismal season.

Barbara Taibi is a tax partner in EisnerAmper's Personal Wealth Advisors group, and has been in public accounting for some 30 years. She can remember the bad old days, "when the concept of staff appreciation didn't exist," and the only thanks she got for logging in mega-hours during busy season — which was called tax season back then — "was that you were lucky to have a job."

In a better place

Things have come a lot way, she said, with a sigh of relief. CPAs still put in long hours, but good training and open-door policy, along with firm-provided essentials like pizza and ice cream make the season a lot more bearable. "At a basic level, we recognize that when people get the right training and know that they can talk to someone about any hitches or frustration, their job is likely to go a lot better," she said. "But that's just the beginning. At the start of busy season, after we call everyone together and lay out the ground rules, each office will have some kind of kickoff event, like bowling or another group activity. Then, as we dig into busy season, we'll stage impromptu pop-up parties, with ice cream and other treats to take the edge off."

In March, the firm brings in a professional chair masseuse on Saturdays to help take the edge off; and EisnerAmper also says "thanks" by handing out "generous gift cards" to people who go above and beyond, like coming in on a Sunday, Taibi added.

Some year-round policies also take on a special significance during busy season. "Every month we have a birthday party to recognize employees' special day," she explained. "We'll bring in a cake, or cupcakes or other treats."

The firm also has a dedicated, local "global scheduling" staff "to be sure no one is overwhelmed with assignments," Taibi said. "Year-round, every week, they sit down with staff, up to seniors, to see how they're doing and whether their workload needs to be adjusted."

The ability to work remotely is also a big relief, especially during busy season. "When I was younger, it was all about 'face time,' or being in the office as much as you could," she recalled. "A managing partner would be walking around, and it wasn't good if you weren't seen," because it implied the employee was slacking off.

"Now, I try to leave by 7:00 p.m. during busy season, and maybe stop off for a yoga class to recharge," said Taibi. "Then I'll get on my computer at home and work from about 9:00 p.m. to 11:00 p.m. It's a long day, but at least it was broken up and I can end it from home. It's nice to see change



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The personal touch

Adding a splash of personality goes a long way to easing the burden of busy season, according to John Evans, the partner-in-charge at Marks Paneth's New Jersey office. “Walking around the office and asking people how they're doing, and thanking them for their hard work, lets them know you care about them as an individual,” he said. “I try to find out what's going on with them, and acknowledge any issues and try to help them work out their work-life balance. I remember years ago, when I was on the staff, how it felt good when partners went out of their way to connect with me.”



Evans

During busy season he'll also stop by Wegmans on the way to the office “and buy baked goods, or fresh fruit for the office,” Evans added. “Some afternoons we'll order in six-foot heroes and salads, or I'll run out and get 10 boxes or so of high-end ice cream so we can have a mini-party. People get excited about that, like they're little kids.”

Flex time also helps to make things a little easier. “We recognize that you've got to be reasonable — people have a life outside of the office, and things happen,” said Evans. “Especially if you've got kids and both spouses work. So we're pretty good about letting people work from home, or enabling them to adjust their schedule, as long as they don't abuse it. But sometimes there are client meetings where you just have to be there.”

Other firms also take steps to loosen up the atmosphere. In addition to traditional touches like working remotely, or bringing in lunches and dinners, Withum adds stress relievers like closing the office for an afternoon around St. Patrick's Day. “We do it right in the middle of busy season,” said Chief Talent Officer Theresa Richardson. “Each office will do different activities that afternoon, like going to a Dave & Buster's [entertainment center]. It's better than just sending people home for half a day, since they'd just be thinking about work.”

Every Friday, she added, “We have a Theme Day, where people will dress up in a certain whimsical style, like wearing their alma mater-branded or favorite team jersey. When we work late, offices will stage ‘Busy Season Games,’ where we'll take a break for in-house miniature golf, or exercise, or a wine-cheese party.”

Withum also embraces a kind of support system during the crunch time.

“A busy season buddy program randomly assigns people to cheer up someone, on an anonymous basis, by leaving a nice note or candy on their desk,” said Richardson. “On the last day, each buddy's identity is revealed.”



Richardson

Setting boundaries can help

Some accounting firms, like McCarthy & Co., set boundaries during tax season in an effort to combat CPA burnout. “We set limits, like 65 hours a week during busy season,” said Managing Partner Martin McCarthy. “And each person is required to take off one Saturday a month.”

His firm also brings on additional staff throughout the year, “so we're not up against as much of a crunch time during busy season,” McCarthy added. “When you recognize staffers' concerns, everyone's happier and there are fewer problems.”



Rudes

Progressive programs year-round, supplemented by busy-season perks can do a lot to relieve the knots, according to Heather Rudes, senior director of human resources at The Bonadio Group. “We have numerous benefits, perks and programs that exemplify our commitment to easing the burden of busy season for our accountants,” she said. “Our goal is to ensure our people are able to relax during the ‘off-season,’ and feel appreciated and valued during the busy months.”

Year-long perks include a “dress for your day” dress code policy, flexible work from home policy, and an unlimited paid time off policy. During busy season, “We have weekly happy hours, by office and by team; chair massage offerings, and pet therapy days,” she said. “The firm also brings in catered breakfast and lunch on Saturdays. Each office and team also have their own end of busy season party.”

CPA firms ask a lot of their employees, especially during tax season. But giving something back to them can make a big difference in performance, and in reinforcing firm loyalty.