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Post-Tax Season Debrief:
How to evaluate your team's strengths and opportunities

Congratulations! You made it through another tax season. After getting some well-deserved rest, now is a great time to assess your team's performance while the last tax season is still fresh in everyone's minds. **Below are some tips to help you evaluate what went well and how to improve your services.**

1. Client satisfaction

For most businesses, the bulk of revenue comes from just 20% of existing clients.[1] As your firm seeks to grow its profits, look at existing clients before investing in acquiring new ones. **Here are some questions to help you evaluate if your current client relationships are being nurtured:**

- How satisfied were clients this year with our services? Did we offer a better experience than last year? Why or why not?
- Where did we experience internal and/or external communication breakdowns that impacted client satisfaction? What caused those breakdowns?
- Did any workflow or technology issues prevent us from responding to inquiries promptly?
- Could we have handled any client issues better? If so, how?

You can also check in with clients throughout the year to build stronger relationships, ask for referrals, and offer additional services.

2. Accuracy and compliance

Tax laws and regulations constantly evolve. It's critical to stay on top of the latest changes so you can provide clients with the highest level of service while avoiding penalties and fines. **Ask yourself these three questions to determine how well you are performing in this area:**

- Could we have prevented any errors or found more relevant deductions?
- Do we need to strengthen our expertise in practice areas like risk or ethics?
- Did anything prevent us from complying with all applicable tax laws and regulations?

If accuracy is a challenge, you may want to find CPE courses that will enhance your team's knowledge so they can identify deductions and remain compliant.

3. Efficiency

Maximizing efficiencies is critical during tax season when you must accomplish a lot under tight deadlines. **Here are three questions that will help you uncover inefficient processes and find areas to streamline:**

- Where were our biggest bottlenecks, and what factors caused the slowdown? How can we eliminate or improve those factors?
- Are there any manual, repetitive, or time-consuming tasks we could automate?
- Can we allocate our time more effectively next tax season?

Regularly review your workflows and processes to identify areas for improvement. You may need technology that automates tedious tasks, streamlines bloated processes, and makes your team more efficient.

4. Technology

The right technology can streamline your workflows, reduce errors, improve collaboration, and enhance the client experience. But you'll only see value from your tech tools if your team embraces them. **Here are three questions that will help you determine if your technology is driving value:**

- What technologies are we currently using? Is there room to consolidate to save costs?
- Do our tools support hybrid and remote collaboration?
- Do we need to bring in new technologies to improve processes like document requests or client collaboration?

Invest in an all-in-one solution to optimize your workflows and client experience. For example, selecting a tool with automated e-signature can help you get documents signed faster. And giving clients a portal to track your progress can improve your transparency and their satisfaction.

1. https://en.wikipedia.org/wiki/Pareto_principle

Next steps:

1. Schedule a 60-minute meeting with your team to review this checklist.
2. Evaluate how many issues resulted from your technology and whether you need something new.
3. Consider a more robust technology solution to overcome challenges and create efficiencies.

Streamline your processes with **ShareFile for Accounting**. ShareFile provides a central, secure location where you can accelerate client onboarding, simplify document management, and collaborate with your team.

Learn more about this client experience solution at **www.sharefile.com**.

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