



## Top Time Management Tips for Accountants

Each e-bulletin, I provide some practical time management tips that accounting firms we work with use from day to day. The idea is to challenge your current approach. Just try it, even if you are not sure it will work for you. By doing things differently, you will quickly discover what is effective and what is eating into your day. In previous months, I have covered

- #1 Tackle small tasks on the spot if they can be done quickly.
- #2 Use the 4-D approach - drop it, do it, delegate it or defer it.
- #3 Using emails more effectively
- #4 Take a break, regularly
- #5 Use a weekly planner
- #6 Manage your client relationships proactively
- #7 Document standard working papers and review processes

### This bulletin's tips:

#### #8 Implement a strong screening process for phone calls

The first step is brainstorm all the reasons for calls coming into the office. This is best done by the entire team as this is the only way you will be able to document a comprehensive list.

Go through the list of calls and identify which calls can be handled immediately by your receptionist. Document a screening process which is efficient, positive and professional. Make sure the receptionist has scripts and is trained on what to say in various situations and please brief them on when you will be back in the office. There is nothing more unprofessional than a receptionist who doesn't know when the partner or manager will be back in the office and says so. The calls which are left on the list after the initial screening process will fall into one of these three categories:

1. Calls you can almost eliminate by being more proactive as a firm. That is, implementing procedures that will significantly reduce the need for a client to make the phone call in the first place.
2. Calls which can be handled by someone else in the firm.
3. Calls which only you can deal with.

When you are classifying the remaining calls into one of these three groups, make sure you ask at least one other person in the firm to challenge you if you have too many calls in the third category of those which only you can handle.



## #9 The 6 step process for more effective meetings

**Step 1.** What is the objective of the meeting? If you're the facilitator, do you know specifically what you want to get out of the meeting? Have you clearly outlined this to all staff attending the meeting. With a clear objective, you can quickly focus on what's important and have the meeting concluded quickly and efficiently.

**Step 2.** Have you prepared adequately for the meeting. If reports are required for the meeting, have they been circulated before the meeting. How can you expect attendees to be prepared if they haven't had a chance to consider what you want to discuss?

**Step 3.** Is there an agenda for the meeting? An agenda is particularly important if you're meeting with clients, as an agenda shows the client you are organised and also ensures that the meeting stays on track.

**Step 4.** Have you determined who will be facilitating the meeting? Nothing is more embarrassing than having a group around a table, with no-one sure who is going to start the conversation or manage the flow of ideas and thoughts. Facilitation is an important job. If you have staff who will regularly facilitate meetings, get them to take a course on facilitation or at least buy them a book to help them better understand their role.

**Step 5.** One of the biggest complaints I get from staff, especially managers and partners, is that so much time is spent in meetings for so little output. If you don't walk out of the meeting knowing EXACTLY what is expected, then the meeting is probably a waste of time. Minutes create accountability. You can identify the task, who is responsible and when it must be completed.

**Step 6.** Finally, follow-up is always required to ensure that agreed actions are completed. Whether you have another meeting or simply get feedback from staff who have been allocated actions, effective follow up will obviously help to ensure that meetings are worthwhile. Standard work papers are critical as they standardize work practices and reduce the amount of time needed to do the work.

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**These hints come from *Take Control of Your Time – A 10-part Time Management Program* specifically developed for Accounting Firms.**

Visit [www.bizaptitude.com.au](http://www.bizaptitude.com.au) or contact Dorothy Crosby on 02-9904 8400 for more information on how you can help your team develop their time management skills.