

FREE GUIDE

The Stress-Free Busy Season Playbook

Practical systems to reduce overload, improve turnaround times, and scale capacity during busy season for CA & CPA firms.

INSIDE THIS GUIDE

- Capacity planning framework
- Delegation matrix — what to keep onshore vs offshore
- Workflow optimization systems

Prepared by AuditTree | Offshore Excellence, Onshore Confidence

SECTION 1

The Busy Season Capacity Framework

Forecast Workload Early

Start planning at least 60–90 days before peak season.

Recommended Planning Areas

- Expected return volume
- Client complexity
- Deadline mapping
- Reviewer availability
- Staff bandwidth
- Overflow capacity planning

Sample Capacity Planning Table

Area	Planning Question
Staffing	Do we have enough preparers and reviewers?
Turnaround	What is our target completion time?
Escalation	Who handles overflow work?
Client Management	Which clients need early reminders?
Review Process	Where are bottlenecks likely to occur?

SECTION 2

The Delegation Matrix

What Should Stay Onshore vs Offshore? High-performing firms clearly define which tasks can be delegated.

Task	Onshore	Offshore
Client Engagement	Yes	No
Client planning meetings	Yes	Partial
Walkthrough / TOC	No	Yes
Analytical / Substantive procedures	No	Yes
Tax prep workpapers	Partial	Yes
Bookkeeping cleanup	No	Yes
Final review / sign-off	Yes	No

Why This Matters

Delegation allows firms to:

- Free up senior staff time
- Improve turnaround speed
- Scale during peak periods
- Reduce burnout risk
- Increase operational flexibility

SECTION 3

Workflow Optimization Systems

Systems that reduce busy season stress:

1. Standardized SOPs

Document repeatable processes for:

- Tax preparation
- Review workflows
- Client onboarding
- Escalation procedures

2. Daily Workload Tracking

Track:

- Returns in progress
- Reviewer status
- Pending client items
- Turnaround timelines

3. Structured Review Layers

Implement:

- Pre-review quality checks
- Reviewer prioritization
- Escalation rules
- Completion checkpoints

4. Task Batching

Group similar tasks together to improve efficiency and reduce context switching.

FINAL STEP

Busy Season Readiness Scorecard

Score yourself from 1–5 on each area below.

- Resource capacity
- Reviewer availability
- Planning completion
- Workflow standardisation
- Offshore leverage

Score below 20? We'll help you close the gap.

Schedule a Complimentary Capacity Assessment

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