

# 10

ways to make  
Self Assessment  
less taxing

Thursday, 8th December | 11am



Simply brilliant software



**Welcome to today's  
webinar**



Simply brilliant software

Accountancy, tax, payroll and  
practice management software



# Your presenter

## **Jonathan Stobart**

Jonathan started his career in a large regional firm of accountants based in the Midlands, where he worked for ten years.

In March 2020 Jonathan joined AccountancyManager and later joined Bright as part of the AM acquisition in 2022.

Having spent his entire career working with accountants, Jonathan finds himself passionate about the industry and the tools that accountants can adopt to enhance their practice.

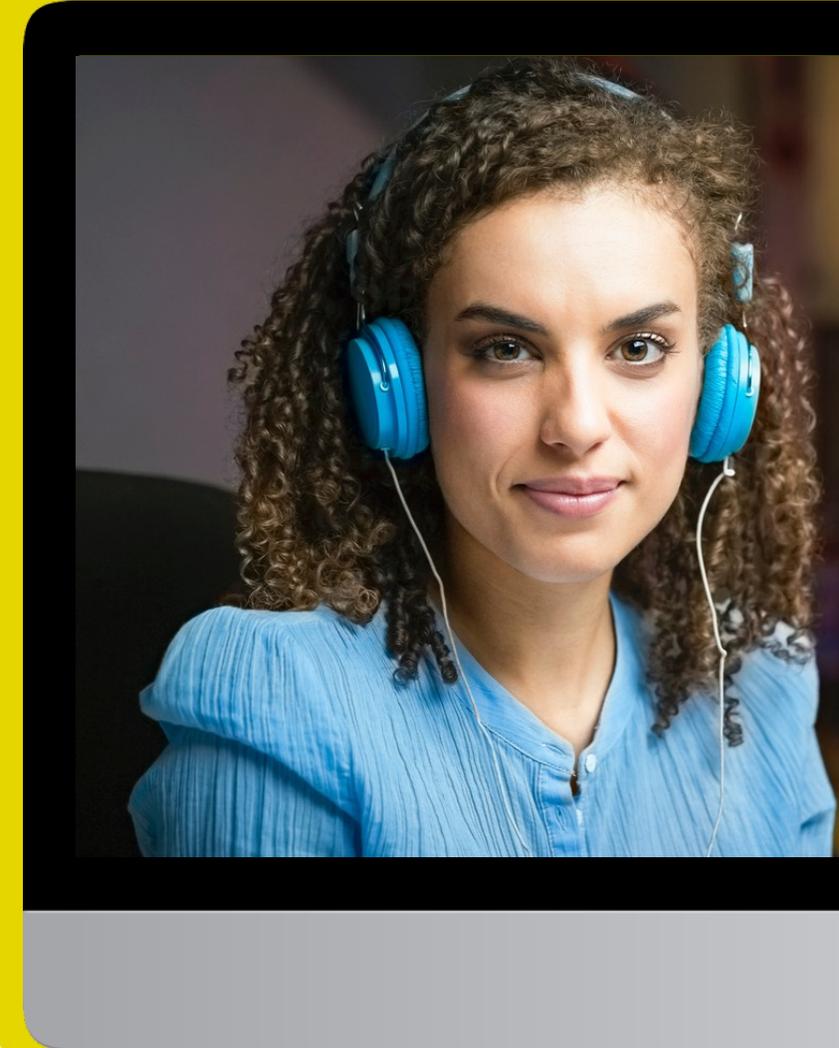


**Jonathan Stobart**

Events and partnership  
manager

# Learning objectives

- How to best utilise your tech to promote internal efficiency
- How to manage your team's and individual workload
- Actions you can take to promote a positive office culture during what can be a stressful period
- How to manage client relationships so they collaboratively work with you.
- Questions and answers session

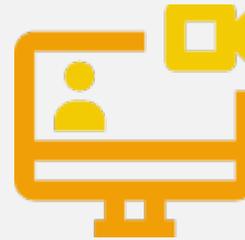




Questions



Handouts



Recording



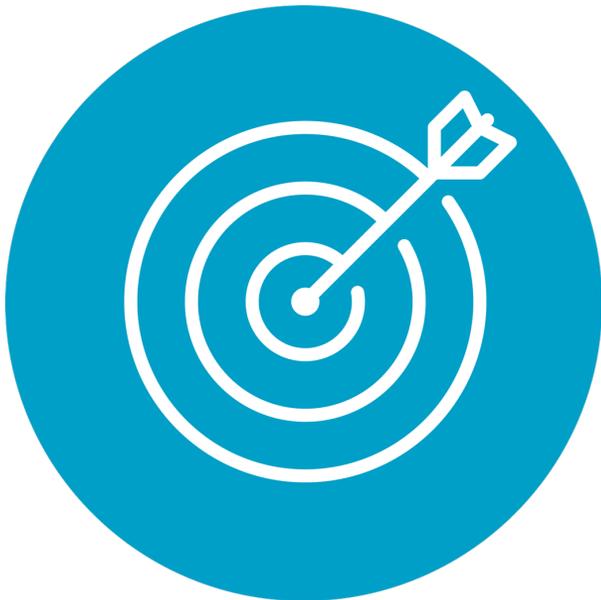
Email

## Less Tax, more Christmas

HMRC has revealed that More than 31,000 Self Assessment tax returns were submitted over the festive period in 2021 with 2,828 filed on Christmas Day



# 1. Look back, move forward



Talk to your team

Analyse the data

Identify the pinch points

## 2. Draft up your email templates

### 3. Check in with your troublemakers



**Segment the client base**



**Talk to the 'difficult' clients first**



**Use technology to automate communication**

## 4. Understand your tech stack



**What functionality do our current apps provide?**



**Implement smart technology that can automate admin work for staff**

## 5. Set rules for clients



## 6. Create positive company culture



- Asking for opinions and input
- Hearing ideas fully before saying 'no'
- Giving your team space to work it out
- Supplying regular, constructive feedback
- Empower them to make decisions

## 7. Pricing and onboarding new clients

- Create a sliding scale of fees
- Efficient onboarding process
- It's ok to turn work away



## 8. Work with workflows



Systemise processes



Automated delegation



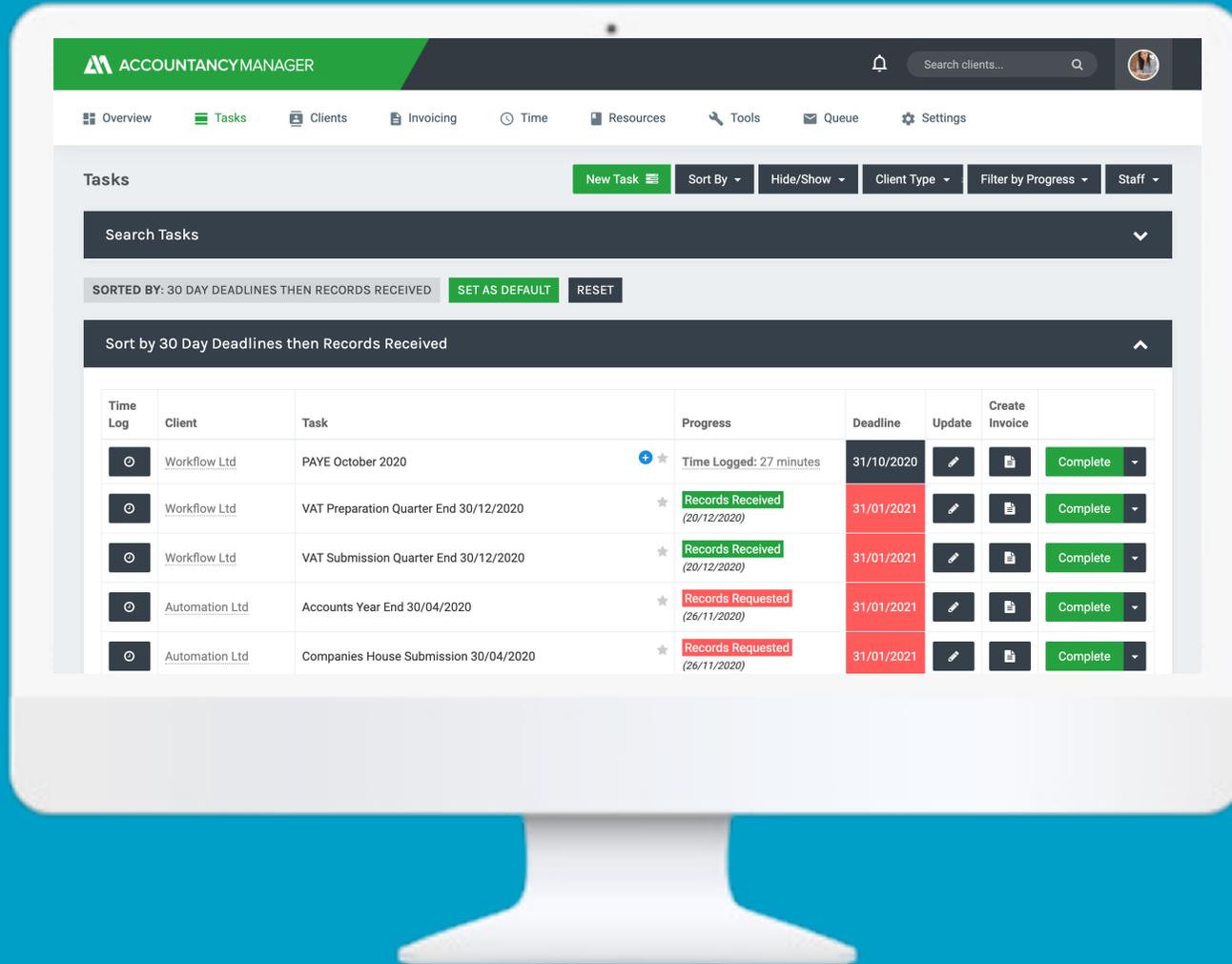
Improved productivity



Increased profitability



# 9. Get smart with software



Why would you make work harder when you don't need to?

## 10. Make a plan and work to goals

- The mid-week peak
- Upskill your team
- Utilise smart communication tools
- Treat yourself and team in Feb!



## Key takeaways

- Communication with clients is key! Manage their expectations and outline important dates.
- Keep team morale high. It can be a stressful time, and you'll need to motivate the team to keep up the excellent work.
- Utilise software to do your admin. In today's world humans don't need to be sending repetitive emails.





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practice management and tax solutions



# Questions & Answers

