

Want A Better Tax Season?

**Defeat These Dirty
Dozen Dogmas**

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About Hitendra

As the President of Global F&A Services at Datamatics, he drives the company’s Finance & Accounting business vertical. His expertise spans client accounting and advisory services (CAS / CAAS), emerging accounting technologies, and CPA firm success.

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Dogmas.

Dogmas are beliefs that are well entrenched, often unquestioned assumptions that limit growth, efficiency, overall success, and happiness during the tax season.

And in the accounting profession there are a dozen (dirty, that too) dogmas - the dreaded tax season challenges. Dirty – because they mess with not just your work but with your soul, too.

Here's why each one qualifies, in no particular order:

DOGMA 1.

More Hours Equals More Productivity

Believing longer hours directly lead to better results is a myth. According to the SHRM 2023 report based on a survey of over 10,000 workers, long hours lead to burnout, not productivity. The report provided data-backed insight stating that employees who feel pressured to work after hours report 20% lower productivity throughout the day. Reduced efficiency and increased errors are the inevitable results of longer hours.

To defeat this dogma, calculate the money down the drain because of 20% lesser productivity at your firm. That amount would be significant. **You need to create more/adequate capacity.**

DOGMA 2.

Clients Will Always Provide Complete Information on Time

Assuming clients will submit everything promptly leads to frustration and delays. Proactive communication and expectation management are needed to avoid last-minute scrambles.

To defeat this dogma, you need to **plan for peak load periods** within the season, not just for the whole season, as the workload will be unevenly distributed. Setting up regular check-ins with clients, adjusting deadlines for clients to provide their information, or offering better templates to expedite information gathering can help, too.

DOGMA 3.

Perfection is Always Achievable

Striving for perfection can be paralyzing. Tax work requires balancing thoroughness with practicality—perfectionism can cause delays, overwork, and stress. Perfection can be more challenging if you do not attend to tax workflow optimization.

To defeat this dogma, you need to **do more review than preparation** – to ensure quality and accuracy.

DOGMA 4.

You Must Accept Every Client, Even Difficult Ones

Not all clients are worth the hassle. Problematic clients drain resources and time that could be better spent on higher-value, easier-to-manage accounts.

To defeat this dogma, define your ideal client profile and **be selective** about the new clients you take. (Ask them: "Why are you looking to change your tax preparer?" The answer(s) can tell you if they will be problematic.)



DOGMA 5.

Traditional Pricing is the Only Way

Relying solely on a fixed, per-tax return rate ignores opportunities for increased profitability, which better reflects the unique value you provide.

To defeat this dogma, turn (client tax situation) complexity into opportunity by **upselling / cross-selling** your non-tax services.

DOGMA 6.

Technology Adoption Can Wait

Postponing the integration and automation and implementation of new tools only makes future tax seasons harder. Tech reduces manual work and errors, freeing up capacity and improving accuracy.

To defeat this dogma, you need to get that new tax software / integration / automation done at least **two months before** the tax season starts.

DOGMA 7.

Delegation Means Losing Control

Fearing that delegation compromises quality or control leads to burnout. Smart delegation through **CPA firm outsourcing** empowers team members and ensures smooth operations during crunch time.

To defeat this dogma, you need to **create more / adequate capacity**.



DOGMA 8.

Tax Season Chaos is Inevitable

This belief leads to complacency. With the right planning, technology, and client management, chaos can be mitigated, and tax season can run smoother.

To defeat this dogma, you need to proactively preempt and obviate the issues that cause the chaos – **capacity** (estimate capacity to include growth target), **client delays** (offer discount for early information or set higher price after a certain date), and (inadequate) **staffing**.

DOGMA 9.

Work-Life Balance is Impossible During Tax Season

While the workload is heavy, believing balance is impossible ensures burnout. Efficient workflow, delegation, and self-care practices can maintain well-being during the busiest months.

To defeat this dogma, you need to **create more / adequate capacity**.

DOGMA 10.

Your Workflow is Set, No Need for Optimization

Assuming your existing workflow is untouchable closes the door to improvements that could save time and energy. Continuous optimization can lead to significant gains in efficiency.

To defeat this dogma, you must try out different workflows **before the season**. Look for what causes the most back and forth of returns – most likely different expertise among team members, non-cohesive workload management by each team member, etc. and set it right before the season.



DOGMA 12.

Staff Shortages Mean You Have to Do It All Yourself

Assuming you must carry the entire load if you're short-staffed only leads to burnout. Outsourcing, technology, and intelligent delegation can compensate for staffing challenges.

To defeat this dogma, you need to explore outsourcing to a provider that has relevant expertise – and, preferably, **works exclusively with CPA / Accounting firms.**

DOGMA 11.

Every Client Deserves the Same Level of Service

Not all clients require the same level of attention. Tailoring services to client value and complexity can optimize resources and client satisfaction.

To defeat this dogma, use **tiered pricing** to include (or exclude) **tiered access** to you or your staff.

Want to Defeat the Dirty Dozen Dogmas?

Imagine a tax season where late nights, chaos, and missed deadlines are a thing of the past. It's not just a dream—it's possible when you defeat these dogmas.

Let us help you win the war against these dogmas to help you break free from inefficiencies, reduce stress, and create a smoother, more profitable tax season.

We have been working exclusively with CPA/Accounting firms over the last 20+ years and have processed hundreds of thousands of tax returns for our clients. Our expert and experienced staff can become productive for you within no time to process tax returns according to your firm's processes. At the same time, you also benefit from the best practices we have learned over the years working with firms like yours. Our highly secure technological infrastructure (Soc2 compliant, GDPR ready, etc.) means no data security and confidentiality worries. Our Gold-Standard maker-checker-reviewer-supervisor structure means you receive returns ready to review and file quickly.

Invest just 15 minutes to speak with our expert to explore whether this fits your decision to make the upcoming tax season better for you, your firm, and your team.

Click here to book your no-obligation call with one of our experts.

*Join the 150+ CPA firms
who have defeated these
dogmas to streamline their tax
season with our expert help.*



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Why Datamatics Business Solutions is your best choice?

Datamatics Business Solutions has over 20+ years of experience providing scalable and efficient Accounting, Bookkeeping, Audit, Client Advisory Services (CAS), and Tax preparation services EXCLUSIVELY to CPA/accounting firms worldwide. We do not compete with accountants.

With a team of 1,500+ experienced and qualified accounting professionals, we enable 150+ firms streamline their financial operations, ensure compliance, and drive profitable growth. Our experienced and qualified accounting professionals backed by years of expertise in using advanced software and technologies commonly used by accountants gives us the in-depth knowledge of accounting principles, tax regulations, and industry best practices required to earn the trust and loyalty of CPA/accounting firm clients worldwide. Datamatics Business Solutions is your one-stop shop for reliably growing your firm to thrive in a dynamic and competitive landscape.

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