



# SDSU Student Accounting Society

## [BDO : A Successful First Busy Season]

October 26, 2020

**Presenters:** Kevin (Tax), John (Audit),

**Presentation:** Successful first busy szn

**Busy Season:**

### **Setting the Stage:**

(How communication is so important while working during busy season)

Follow along, listen, and do the same thing as the manager.

How important verbal in communication is.

### **Audit Busy Season**

Generally January - April, Can vary by client/industry

Work Mostly in the field, can be at client location as well

Typically work 2-4 weeks on the same job.

Entry level, 1 client to 2 clients

Manager level, 2 - 3 clients

### **Tax Busy Season**

2 parts: First part is file tax returns April 15th. Has another busy season of fall, preliminary season until october.

No formal Busy season.

Usually in office, 1% of the time, might go to client location

Depends on the level, project can range from weeks to months.

### **Communication is KEY!**

You cannot NOT communicate!

### **Written**

Get emailed diff documentation at a time

Flagging, using tools to keep notes, always helpful

Two different work papers, work day later, it will slip your mind

Better to be explicit and nice. Come across with a friendlier tone. Be on good footing with client, workers, etc.

Can use emojis?

### **Verbal**

Ensure that your words come off as professional.

### **Non-Verbal**

Huge tell for people is their body language. How they're sitting, are they slouching, etc.

Come in and be nice, wishing each other well will keep it friendly in the work environment. Make or break if busy season will be fun or not.

### **When it backfires**

We're human, we make mistakes.

Written:

- Emails
- Memos

Verbal:

- Phone
- In person
- Video

Non - Verbal

- Facial Expressions
- Body Language
- Handshake

When it Backfires:

- Take Ownership
- Have Humility
- Offer Solution
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### **7 Key listening skills**

**Asking questions is the number one thing you can do**

**Schedule a meeting, ask questions.**

- Be attentive
- Ask open ended questions
- Ask probing questions
- Ask for clarification
- Paraphrase
- Be attuned to and reflect feelings

- Summarize

### **Accepting Feedback**

- Do not take it personal
- Supposed to help you with your understanding.
- Say thank you
- Always follow up

### **Building a Foundation for Success**

- Communication is key
  - Biggest thing for busy season
  - The team is offering help, the senior will drag you through it but it's fine
  - You are not alone, the team is expecting it.
- Teamwork!!!!!!
- Each engagement is different
- Prioritize, organize, excel
- Busy Season breaks!
  - Always have something in mind, mental health is just as important as physical health.

Starts with one client, but many different tasks. Keep up with tasks, it is the make or break point.

### **Questions:**

If you have multiple clients in the busy season, how do you go about travelling between client sites? (Jayson Grey)

-John (Audit)

- Most clients are managers
- Go to client side, but may work on other client's work at one job
- Manage time as best as possible to not travel

-Kevin (Tax)

- Handful of clients does not allow much travel

Organizing emails (Jayson Grey)

-John

- Folders
- Running list of emails to take care of, using flags to show what needs to be taken care

of

- Keep a paper list if you're old
- excel spreadsheet of emails

- Set aside time for emails (15 minute-20)
- 4 hour response time, no later than 24 hours

