Managing Workload and Establishing Boundaries for Today's CPAs

2026 INCPAS Corporate Finance Forum
June 22nd, 2026

Agenda

- Learn practical techniques for communicating capacity
- Establish boundaries without sacrificing value or responsiveness
- Prioritize work effectively when everything feels urgent
- Q&A

Legal Disclaimer

This training is intended for educational and informational purposes.

While we hope that you will learn a lot today, we are not attorneys or tax advisors, and the information should not be construed as tax or legal advice.

The Reality of Today's CPA

You're Being Asked to Do More – With the Same Hours

- Increasing regulatory complexity and client demands
- Higher stakeholder expectations
- Technology changes and automation initiatives
- Reactive work constantly crowding out proactive work

Discussion

How many of you feel like your calendar runs you – rather than the other way around?

What is creating the most pressure on your team today?

Being busy doesn't mean you are productive. Activity isn't the same as effectiveness.

Why Boundaries Matter for You

- Errors in financial reporting, tax filings, or advisory work carry real professional and legal risk
- Scattered focus = increased risk of oversight
- Over-commitment to one client or engagement means others are underserved
- Your professional reputation depends on consistent, high-quality output – not just volume

Boundaries Are a Professional Skill

Boundaries are not:

- ✕ Refusal
- ✕ Resistance
- ✕ Lack of commitment

VS

Boundaries are:

- ✓ Capacity management
- ✓ Risk Management
- ✓ Quality Control
- ✓ Expectation Management

Boundaries Are a Professional Skill

Reframing Our Mindset...

Old Mindset	New Mindset
If I say no, the client will think I'm not supportive.	By setting boundaries, I'm ensuring the best outcomes for my clients and my practice.
I need to be available at all times.	My focus and peace enable better client outcomes.
Busyness signals value.	Outcomes signal value – not hours.
Accommodating every request is good service.	"Guiding clients toward the right approach is good service."

What This Looks Like

Healthy Professional Boundaries:

- Protecting focused work time
- Limiting unnecessary meetings
- Defining response-time expectations
- Clarifying project scope
- Escalating workload concerns early

Not Boundaries:

- Ignoring requests
- Delaying communication
- Refusing reasonable business needs

Communicating Capacity

Key Principle:

Always frame the boundary as being client-focused.

- “I want to give your question the attention it deserves. I’ll review and get back to you by Wednesday.”
- “That’s important. I’m going to schedule out time on Thursday to give it proper attention.”
- “To make the most of our time, can you share your top 2-3 priorities for this call?”
- “Those are all important items. To ensure we address each one effectively, let's prioritize them together. We can determine what should be addressed immediately and what may be better scheduled for a future phase.”

- "The best results typically occur when we have adequate time for review and planning. Whenever possible, providing information a week in advance allows us to be more strategic and helps reduce the risk of missing opportunities or important details.“
- "To help us meet your desired timeline, we'll need the requested information by Friday. Receiving it after that date may impact completion timing, and I want to make sure we set realistic expectations so there are no surprises.“
- "I don't believe that approach would produce the best outcome for your organization. What I would recommend instead is..."

Remember…

The goal is not to do less work. The goal is to do the right work at the right time and at the right level of quality.

How to Prioritize Client Requests

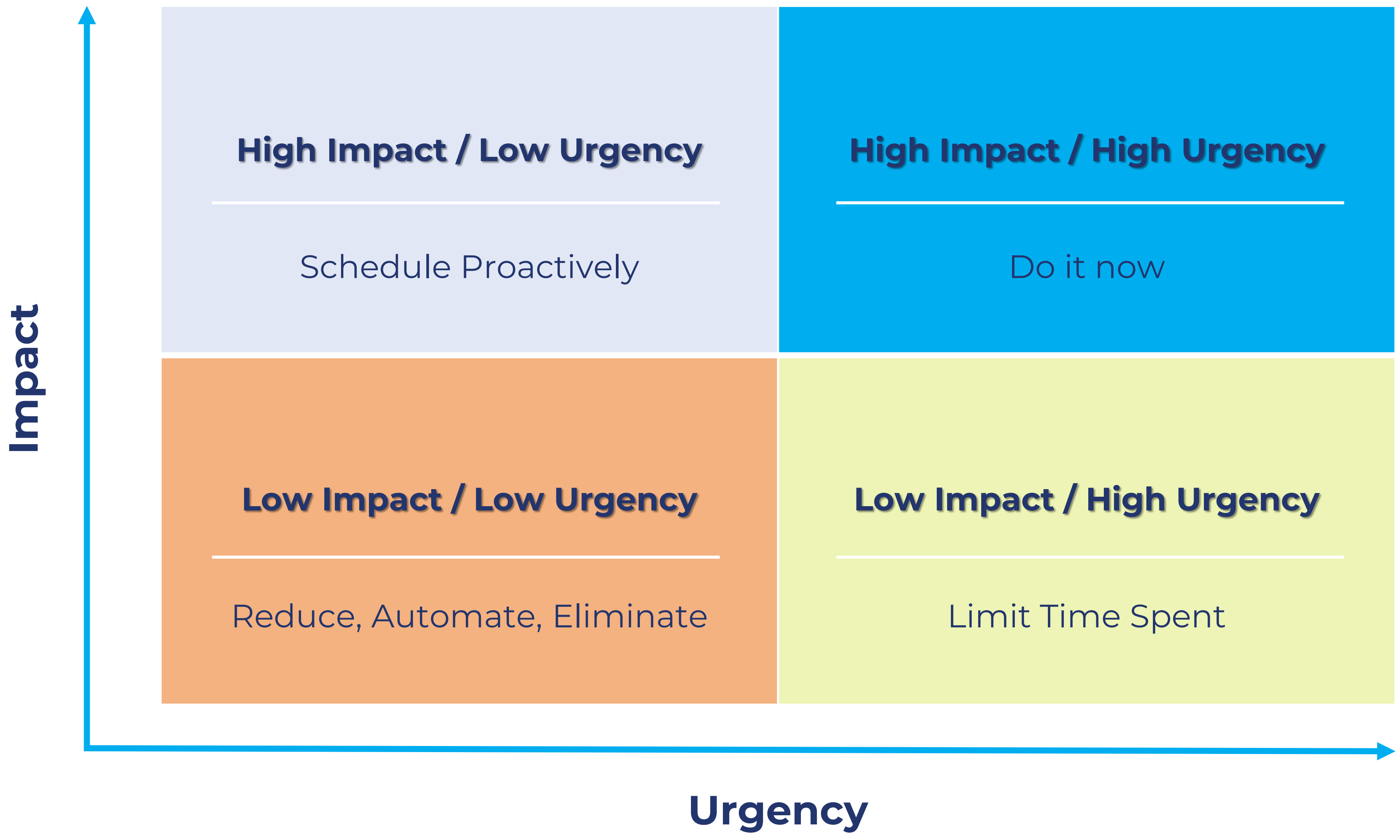
- Evaluate time sensitivity
- Set realistic expectations
- Categorize requests – critical/high/medium/low priority
- Rely on SLAs
- Ensure older requests are not neglected
- Ongoing communication and status updates, even if not yet completed

Questions That Clarify Priorities

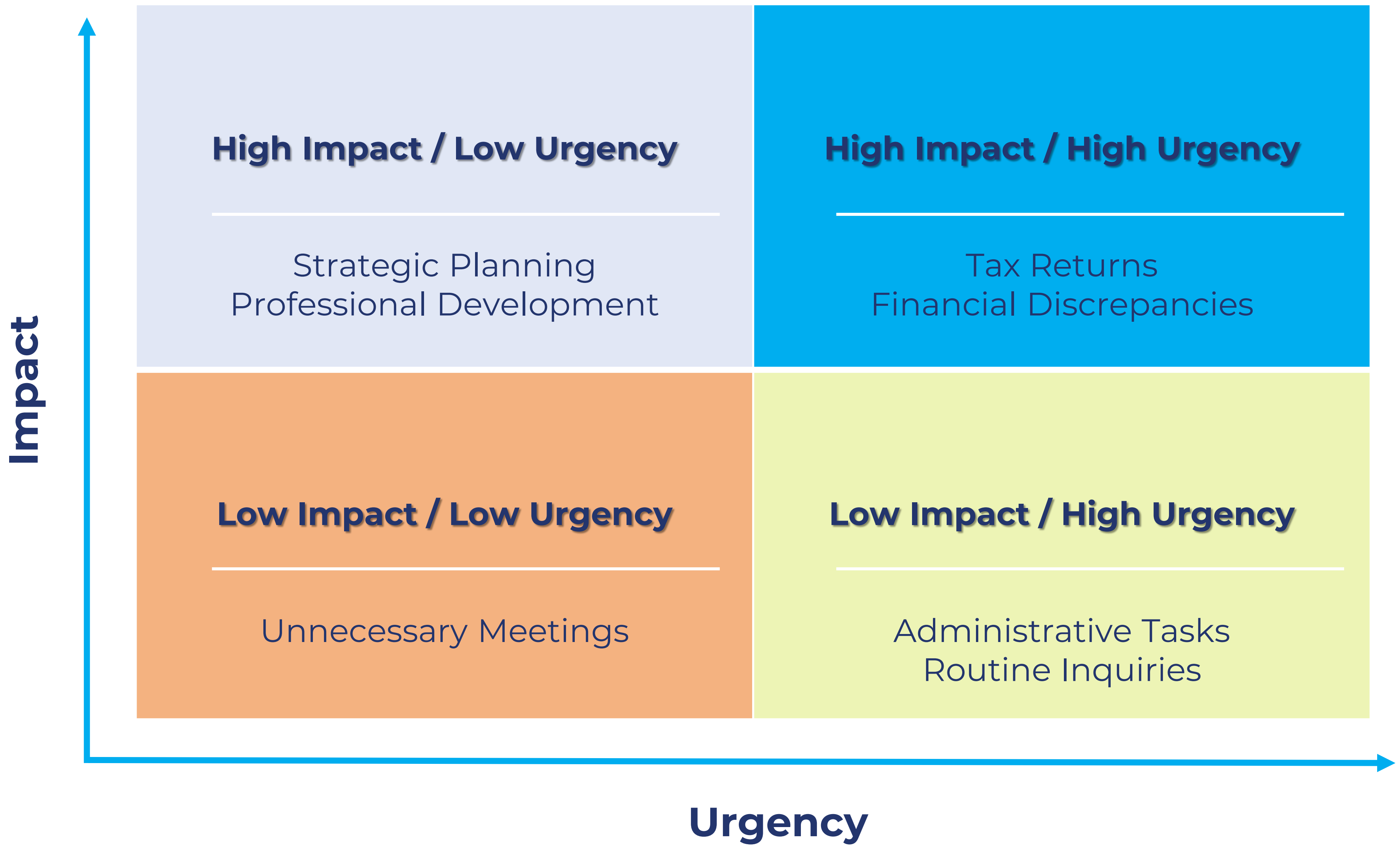
- What is the business impact if this waits?
- What deadline is truly fixed?
- Who is the decision-maker?
- What carries the greatest compliance risk?
- What work can be delegated?
- What work can be simplified?

Rule: If everything is urgent, nothing is urgent.

Prioritization Matrix



Prioritization Matrix



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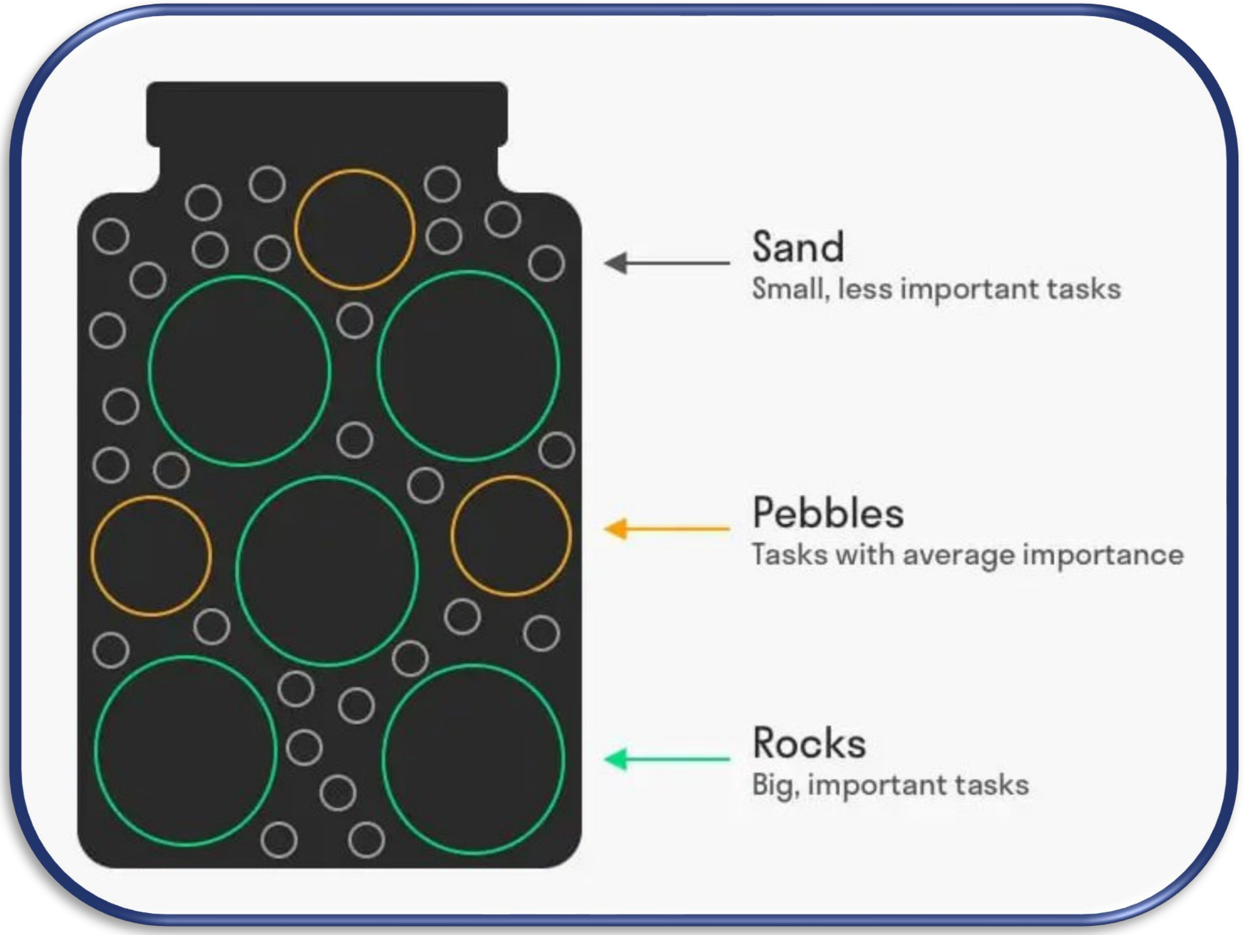

The Pickle Jar Theory

The 1:4:5 Daily Priority Rule

A simple framework to start every day

Priority Level	What it Means
1 High-Priority Task	Your must-complete item with the biggest impact
4 Mid-Level Tasks	Important but not urgent; keeps work moving
5 Low-Priority Tasks	Quick, non-urgent items; complete if time allows

- Each morning, identify your 1:4:5 and build your day around them
- Start with the top priority
- Focuses energy on high-value work, prevents overwhelm, and ensures steady progress across all engagements

The Ivy Lee Method

1. At the end of each workday, write down the six most important things you must accomplish tomorrow. Don't write down more than six to-dos!

2. Rank those six tasks in order of importance, from most important to least important.

3. When you begin work the following day, concentrate only on the first task. Finish it before moving on to the second task.

4. Continue working through your list in the same way. Move any unfinished tasks to your new list of six tasks for tomorrow.

5. Repeat this process every workday.

Calendar Management

If it’s not on the calendar, it won’t happen

- **Set time aside** for client caseload planning
- **Block focus time for high-complexity work:** protect it like a client meeting
- **Designate at least one "Focus Day" per week:** no client meetings, dedicated to project and proactive work
- **Time-box urgent requests:** give yourself a set limit to contain them, then return to important work
- **Group meetings** in blocks to free up larger uninterrupted windows
- **Reserve email windows:** 2-3 set times per day rather than constant monitoring

Building Your Operating Rhythm

Consistency Creates Capacity

An operating rhythm bridges the gap between strategy and execution – it's a ***strong, regular, repeated pattern*** that keeps your practice running without constant triage.

Daily

- Identify your top 3 priorities before opening email
- Reserve focused work blocks for high-complexity tasks
- Set 2–3 email response windows
- Expect the unexpected
- Build in breaks

Weekly

- Review your engagement backlog – what's aging?
- Identify which clients/matters need proactive attention
- Protect your focus day

Monthly/Quarterly

- Reflect on time allocation: Am I spending time where it creates the most value?
- Review engagement scope vs. actual hours

Breaking the Habits That Steal Your Time

- Treating your inbox as a to-do list
- Over-preparing for routine client calls
- Letting meetings run long without agendas
- Answering the same questions repeatedly instead of creating resources
- Letting every request feel equally urgent
- Over-customizing deliverables beyond what adds client value

Ask yourself: **is this extra time creating noticeable value for the client? If not, you're investing energy where the return is low.**

Before Adding Hours, Add Efficiency

Questions to Ask:

- Can it be automated?
- Can it be standardized?
- Can it be delegated?
- Can it be eliminated?

Sustainable organizations solve workload problems with systems, not heroics.

High-Performing Teams Normalize:

- Discussing capacity
- Asking for help
- Escalating risks early
- Prioritization conversations
- Continuous process improvement

Staffing Models

- Accounting students
- Part-time/per diem staff
- Interns
- Seasonal support staff
- Administrative assistants

- Remote team members
- Outsourced accounting support
- Temp-to-Perm
- Project-based contractors
- AI tools

Staffing Models – Delegation to Junior Staff

Tasks to Delegate to Part Time or Junior Staff		CPA-Level Work
Data Entry	VS	Tax Review
Document Collection		Return Sign-Offs
Client Onboarding Setup		Financial Analysis
Customer Service & Follow-Ups		Advisory & Client Strategy
CRM & Workflow Updates		Quality Control

Key Takeaways

- **Reframe boundaries** as a professional skill that protects quality and reduces risk – not a sign of being uncooperative
- **Use the Prioritization Matrix and 1:4:5 Rule** to prioritize engagements and daily tasks
- **Protect your calendar** with focus blocks, meeting limits, and dedicated deep-work time
- **Use professional language** to communicate capacity and manage client expectations without damaging relationships
- **Build an operating rhythm** – daily, weekly, monthly habits that create predictability and reduce reactive chaos

Q&A

Thank you!