Busy Season Bubble Up

Turning Pressure Into Insight

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The pressure of busy season…

Why?

Survival Mode

- Push through intensity

Move Quickly

- Relief replaces reflection

Memory Fades

- Exhaustion and time clouds details

Issues Return

- Problems return unaddressed

The Annual Busy Season Cycle

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So, how do we break the cycle?

- Capture insights as they happen
- Keep it light and realistic
- Use busy season for future gains
- The goal is not to fix things - observe and document

The Signals That Matter and Where They Come From

The Three Signal Sources

01 Clients

02 Team Members

03 The Work

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01 Clients

- Confusion, pushback, silence
- Missed expectations
- Pricing objections
- Apathy or transference of responsibility

02 Team Members

- Process workarounds
- Frustration
- Rework
- Bottlenecks

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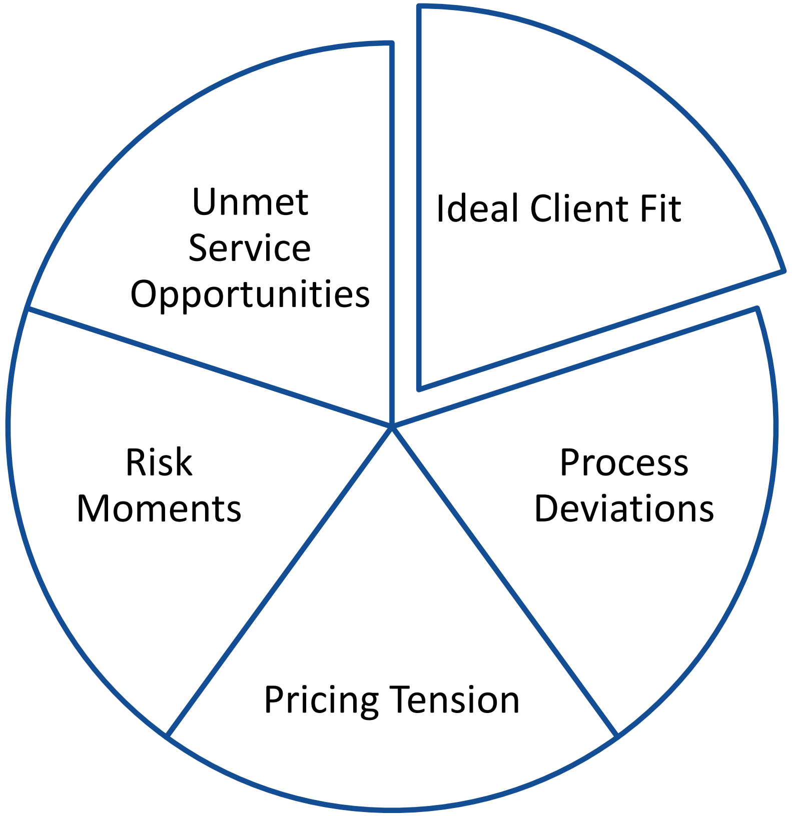
03 The Work

- Delays
- Hand-offs that break
- Extra reviews
- Scope creep
- Errors and omissions

The Core Signals



- Who is easy to serve – even under pressure?
- Where does work break, slow or get reworked?
- Effort vs. value. vs. scope
- Errors, omissions, near-misses
- Needs that surface during engagement work

Timing is EVERYTHING

Capture these signals:

- Right after the work is completed
- In the tools you already use
- In 3 – 5 minutes
- Without fixing anything (if appropriate)

Capture now. Decide later.

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Core Tools to Capture Insights

Surveys, surveys, surveys

The value of surveys

- Quick and easy
- Standardized data that can be analyzed
- Provides vehicle for feedback – validation
- Optics – we care what you think

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Client survey best practices

Timing

- After an engagement closes
- After a major deliverable
- After a tense interaction
- Within 24 – 48 hours

Rules

- 2 – 3 minutes max
- Mobile-friendly
- Plain language
- One open comment box

Content

- Rating (1 – 5)
- Expectations met?
- Value for price?
- Communication clarity
- Opportunities for improvement
- How likely are you to recommend?

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Client Survey: Core Questions

- Six questions for quick insights and real improvements.
- Each question designed for quick, meaningful data.

1	**Overall Experience Rating** • **Rate your experience with us:** • ☐ Excellent ☐ Good ☐ Fair ☐ Poor
2	**Expectation Alignment** • **Outcome met expectations?** • ☐ Yes ☐ Somewhat ☐ No
3	**Communication Clarity** • **Communication clarity:** • ☐ Very clear ☐ Clear ☐ Unclear

Client Survey: Depth Questions

1	2	3
Friction Detection **Did anything feel harder than it should have?** ☐ Yes ☐ No *Identifies pain points for follow-up.*	**Improvement Opportunity** **What could we have done better?** [Open response box] *Clients tell you exactly what to fix.*	**Net Promoter Question** **How likely are you to recommend us?** 0–10 scale *Classic NPS: advocate (9-10), satisfied (7-8), or at risk (0-6).*

Send via email with a simple, friendly message. Use conversational tone. "Quick feedback" beats "complete survey."

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Team survey best practices

Timing

- After an engagement closes
- After a major deliverable
- After a tense interaction
- Within 24 – 48 hours

Rules

- 3 – 5 minutes max
- Use existing tools (i.e. practice management or productivity software)
- Standardized formats
- Open comment box for each area

Content

- Ideal client fit
- Process deviations
- Pricing tension
- Upsell opportunities
- Errors and omissions
- Bottlenecks

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Weekly Process "Bubble-Up" Board

- One shared board or document across the team
- Team can add notes anytime
- No discussion (until after busy season)
- Reviewed weekly by leadership
- Should be observation only – unless immediate action becomes necessary

What goes on the board?

- Steps that slow work
- Hand-offs that fail or are confusing
- Rework triggers
- Tool or data issues

Rules of the road during busy season

- Notice without reacting
- Capture without fixing (within reason)
- Protect focus
- Build later with better data

Post-season analysis

After busy season, review the data to:

- Spot patterns across clients, engagements and teams
- Separate one-off issues from real problems
- Understand where pricing, scope and effort don’t align
- See which processes held up and which need to be reworked

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