Productivity hacks
for professional services

Most professionals will relate to the double bind of not having enough time to put into saving time. You may have system reviews in place or be evaluating an app, but tangible change could be months away.

To pick up some quick wins, we'll show you how to work more efficiently with your emails, tasks, and clients then finish with some tips for maintaining well-being. We'll also discuss our recommendations for sustaining productivity.

Press on to gain some actionable advice and consider whether your current workflows are supporting your productivity or hindering it.

SuiteFiles

4 tips to getting on top of your inbox

Don't underestimate the impact of an active inbox. Time spent reading and answering emails can amount to 28% of your workday. Unless you're dealing with time-sensitive issues, that's hours taken away from the day's priorities.

Reconsider 'Reply All'
Replying to an email thread full of recipients can send a ton of excess replies to your inbox. Reduce the number of emails you receive by removing non-essential recipients from lengthy email threads.

Allocate time to checking emails
Checking emails at the start of the day, again after lunch, and once before you leave will allow you to engage with them on your own terms. This means you can follow through on the priorities you set at the beginning of the day and not be side-tracked with a bunch of new ones.

Review your spam filters and audit your newsletter subscriptions
Ensure you're not wasting time with bots or risking the security of your information by editing your spam filters. If you're using Outlook, you'll be able to toggle between low protection, high protection, or be super restrictive and set to 'Safe Lists Only'. Another easy way to make your inbox more manageable is cutting down subscriptions to newsletters you've long since lost interest in. Doing so will free up space and rid your inbox of dead weight.
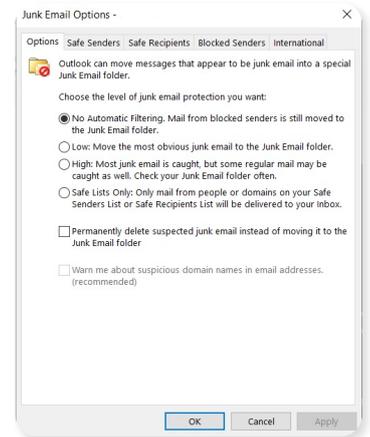
Adopt the inbox zero technique
Get a strategy in place to take control of your inbox. The first step is filing incoming emails into 'Action Required', 'Awaiting Response', 'Delegated', and 'Archive' folders. From there you can set rules and reminders to auto-file emails and follow up as necessary.
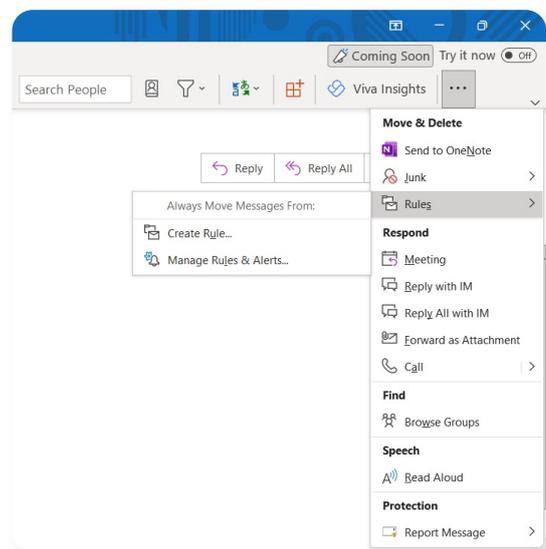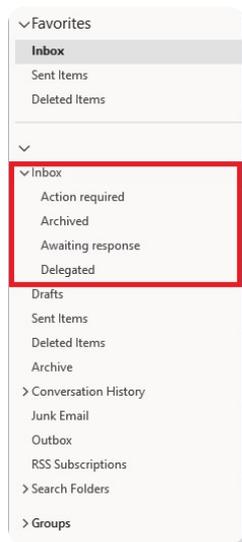
Power through your to-do list

Organizing your tasks can mean the difference between a busy day and a productive day. Let's look at how you can batch and schedule tasks to regularly log productive days at the office.

Start the day with your hardest task
The morning is when you're at your peak – the most engaged, the most creative. Diving into a tough task at your most productive time will help you make progress, resulting in a sense of fulfilment as opposed to the fleeting satisfaction of completing easy tasks knowing the hardest ones remain.

Use timeboxing to organize your tasks
Try breaking down your to-do list into chunks of time organized under a shared calendar. Termed 'timeboxing', this hack is a widely recognized technique for prioritizing work, increasing satisfaction by completing tasks, and enhancing visibility throughout an organization.

Do tasks in batches
A simple way to make progress on your tasks list is to group each task by the level of concentration required. Once you've done so, you'll be able to complete tasks with the same level of concentration in batches. For example, you might have a light concentration block where you're replying to emails and actioning follow ups.

Time	Task
9:00	Client work
10:00	Check emails
10:30	Meetings
11:00	Coffee break
11:15	Document approvals
12:30	Lunch break
1:30	Check emails
2:00	Project task
3:00	Afternoon snack break
3:15	Calls & status updates
4:00	Plan priorities for tomorrow
4:30	Check emails

Concentration level required:
- ○ Break
- ● Light
- ● Medium
- ● Deep

Make your client relationships work for you

Client submissions, queries, and general problem solving can quickly soak up the limited time in a day. Below are some strategies for minimizing client work.

Be firm on client submissions

According to Parkinson's Law, work will expand if given more time for completion. So, the longer you give clients to submit, the later you'll receive their information. Accountants will be all too familiar with the experience of late client submissions pushing them up against tax deadlines unprepared. Avoid a similar dilemma by clearly communicating deadlines and expectations so that files are sent well in advance.

Keep your files tidy

Organizing your files will keep you audit ready and provide an extra sense of security should clients ask you for a specific document. If you're due for a clean, first assess the mess, purge irrelevant files, then organize what's left and make sure files are accessible team-wide. Finish the job by backing them up and establishing good habits moving forward.

Make your website a resource for clients

Think of the most common issues clients contact you about. Do you have a stock standard response or even a templated answer for them? Instead of individually fielding the queries as they come, create a resource center on your website and direct clients there. If you haven't already, set up an FAQ section or whip up some guides that can be downloaded and followed at your clients' own pace.

Set yourself up for success with these well-being tips

Your well-being has a direct correlation with productivity. Below we'll cover some simple but effective hacks to lift your spirits.

Take breaks

When you're under a lot of stress you might not be producing the best quality of work that you're capable of. It's important to understand that it's okay and actually beneficial to take a break when you're feeling stale or overwhelmed. This is especially true if you're darting between meetings where stress is being built up and even worse if you're attending virtually without the natural intermission between spaces. Spend 10 minutes in the sun or leave the building for a coffee break — anything you can do to get your brain out of stress mode and back humming along like it wants to.
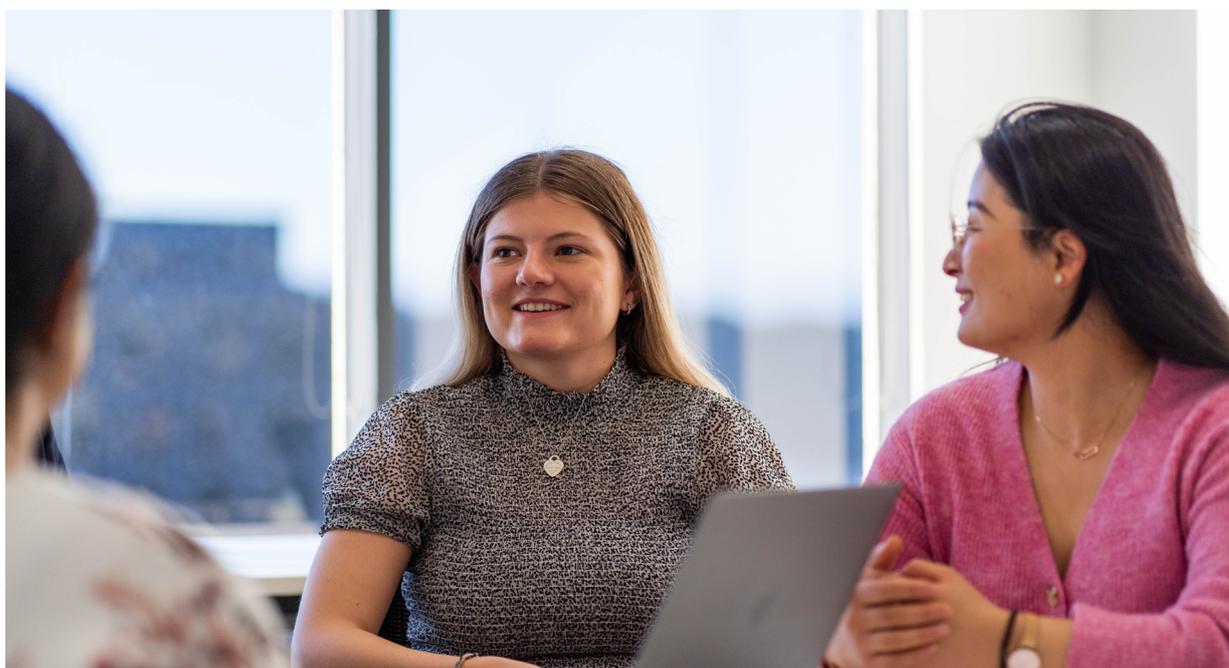
Incorporate nature into your day-to-day

Nature has a soothing impact which can be just what you need for a long day at the office. Try adding a plant to your desk, taking some time to gaze out of a window, or going for a walk outside.

Don't sacrifice your routines during busy periods

It's easy to sacrifice a sleeping schedule or indulge in drastic changes to your diet when you're under pressure. While a little bit of variation can be expected, you should keep in mind that changes to your routine will negatively impact your overall well-being.

Using your business processes to stay productive for longer

Losing 10 minutes here and there all adds up at the end of the week. Imagine what you could achieve with an extra hour or two? You could invest that time into creating better quality work, or even clocking off early.

Here's how you can sustain your peak productivity throughout the week.

Centralize your apps
Ever like to know how much time a week is spent toggling between applications? According to the Harvard Business Review, it comes out to roughly 4 hours a week (i.e. 10% of a 40 hour working week). Consider whether you really need a specialist app to complete a task or whether you'd be paying for features you wouldn't use.

Take our quiz and find out how you score on admin efficiency

Try our quiz

Automate admin and manual work
Manual workflows like creating generic documents, filing emails, and following up with clients are as tedious as they are important. Rather than taking care of these yourself you should be delegating them! Not to another member of staff or an unlucky intern but to software that can complete these tasks at scale. SuiteFiles allows you to automate the creation of generic documents and emails and connects to your inbox, so emails are filed correctly. When sending documents out for signing you can set reminders for the 1st, 3rd and 7th day before your document expires. The end result is the important jobs are accounted for without the investment of time.

Increase visibility of approvals
Use a task management solution which allows you to see each task along with a status and a direct link to the document referenced. SuiteFiles comes equipped with task functionality including filters that organize files by status, name, and due date plus an in-built chat for exchanging feedback and live editing on shared files.
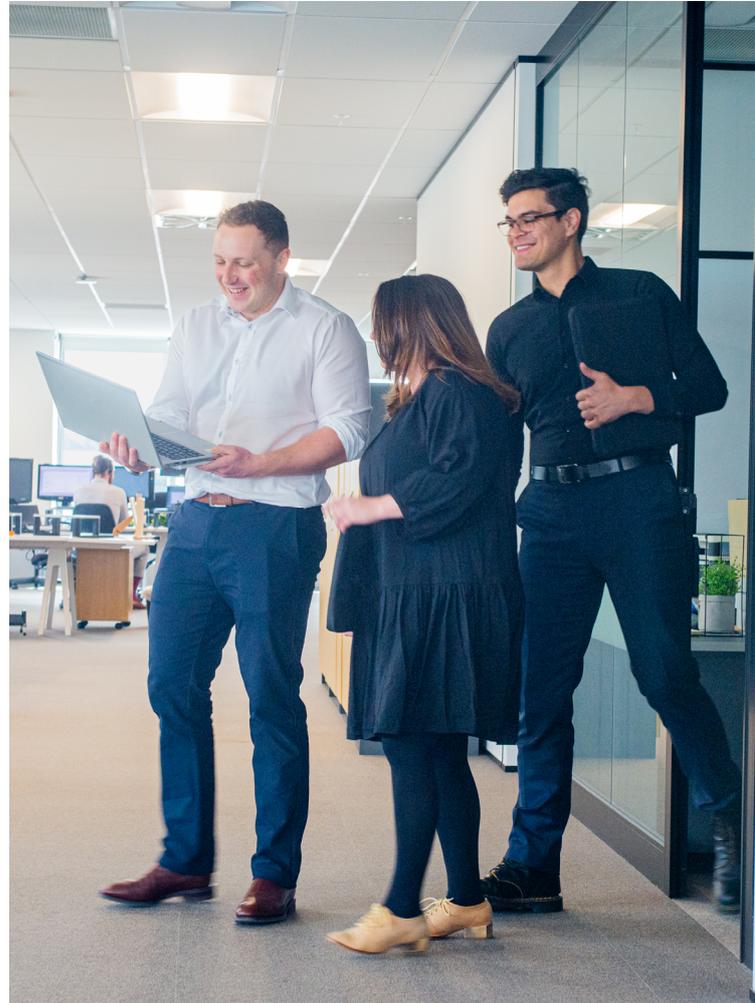
Hack productivity with SuiteFiles

What would your workday look like without…

X Messy folders

X Inboxes bursting at the seams

X Bottlenecks stalling finished work

X Drawn out, manual workflows

We'll show you!

SuiteFiles is time-saving software you can use to store, share, and sign documents your way. **We'll keep you doing the skilled jobs you enjoy instead of the admin keeping you from them.**

SuiteFiles

Join our team for a **personalized demo** and see SuiteFiles in action!