

BEFORE · DURING · AFTER

Busy Season Without Burnout

A capacity planning toolkit for accounting firms



Every firm knows busy season is coming. Few plan for it with real data.

Who says yes



Who has room

Too often, workload is decided by who says yes, not by who has room. The result is predictable: the same people stretched too thin, deadlines at risk, and talented accountants questioning whether the profession is right for them.

WHY IT MATTERS

Capacity planning changes that.

When you can see your team's real availability before the peak, you can share work fairly, protect quality, and keep your best people.

This toolkit helps you...

- ✓ See who has capacity, and who doesn't, before deadlines hit
- ✓ Spot overload early, while you can still act
- ✓ Rebalance work fairly during the peak
- ✓ Learn from each season so the next one is easier

THE FRAMEWORK

Before, during, after

Three phases, nine steps. Each step points to a worksheet on page 3.



WORKSHEETS

Plan, watch, review

Print this page and fill it in by hand.
Use the same names in every table.

A Team capacity map Steps 2, 3 and 5

Team member	Available hours / week	Leave & non-client time	Planned client hours	Load (%)	Status · circle one		
				%	OK	Watch	Over
				%	OK	Watch	Over
				%	OK	Watch	Over
				%	OK	Watch	Over
				%	OK	Watch	Over
				%	OK	Watch	Over

Load = planned client hours ÷ (available hours – leave & non-client time)

Aim to keep everyone at or below ~80% planned load.

B Deadline and workload plan Steps 1 and 3

Client / job	Deadline	Estimated hours	Assigned to	Backup person

C Weekly early warning checklist Steps 4 and 6

Week of _____

- ☐ Anyone above planned hours two weeks in a row?
 ☐ Any job over its estimate by more than 20%?
- ☐ Non-billable or admin time rising?
 ☐ Any client dependent on a single person?
- ☐ Any leave or absence not yet covered?

D After-season review Steps 7 and 8

Job	Estimated hours	Actual hours	Variance	What we'll change next season

KEEPING IT GOING ALL YEAR

From one-off plan to always-on visibility

This toolkit works on paper. But capacity changes every week, and spreadsheets go out of date fast. With Toggl, each part of the toolkit runs in the background:

IN THE TOOLKIT

Capacity map

Worksheet A



Capacity planning with real availability

Deadline and workload plan

Worksheet B



Projects, estimates and assignments

Early warning signs

Worksheet C



Tracked vs. planned hours and estimate alerts

After-season review

Worksheet D



Estimates vs. actuals reports

Fair allocation

Step 3



Team-wide workload view

Visibility should support your people, not monitor them.

Toggl is designed for teams to plan together.

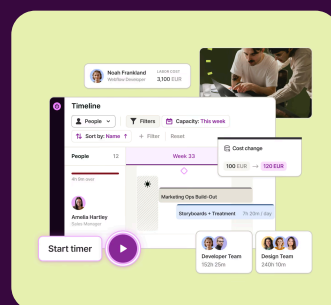
COMPANION GUIDE

Measuring AI's impact on your team's time?
Download our companion guide, **The AI Time Audit**.



Plan your next busy season with Toggl

[Get started](#)



Know where your time goes. Know what it's worth.