tempolia

TOPIC COLLECTION
Tax season

TAX SEASON

Anticipate workload peaks before they become emergencies.

Turn obligations, owners, dates and planned workload into a shared work plan, then adjust as soon as a risk becomes visible.

Tempolia structures recurring deadlines, assigns them to the right engagements and compares progress, prerequisites and available capacity. Partners, managers and teams share a view that lets them prioritise while there is still time.

SEE, PRIORITISE, SECURE

Look ahead
Identify weeks, portfolios or teams under pressure before the peak.

Prioritise
Reassign engagements and prioritise by deadline, prerequisites and workload.

Secure
Share responsibilities and keep a record of completed work.

FROM OBLIGATIONS TO WORKLOAD DECISIONS

Model
Relevant obligations and recurring work.

Plan
Dates, milestones and planned workload.

Assign
Owner, team and backup.

Track
Status, prerequisites and progress.

Rebalance
Priorities and upcoming workload.

500 **obligations ready to schedule**

A library of tax, payroll and accounting obligations that adapts to the firm's portfolio.

BUILD THE WORKLOAD PLAN

Each obligation becomes dated, assigned and manageable work.

Tempolia brings portfolios, deadlines, owners, status and workload into a shared view. Pressure points appear before they become emergencies.

Team workload

Resource calendar · week of 7 September

ILLUSTRATIVE WORKLOAD

RESOURCE	PLANNED WORK / CAPACITY	STATUS
Camille R.	32 h / 35 h	Monitor
Yanis L.	25 h / 35 h	Available
Sofia M.	38 h / 35 h	Rebalance
Thomas D.	22 h / 35 h	Spare capacity

Choose the obligations

Start with tax, payroll and accounting templates, then tailor the selection to the portfolio.

Schedule dates

Set the frequencies, due dates, milestones and prerequisites for each engagement.

Assign the work

Allocate an owner, team and planned time based on available skills.

Check capacity

Compare forecast workload, availability and absences before finalising the plan.

BEFORE THE SEASON STARTS

- **A usable plan from the outset**
  Each row brings together engagement, obligation, date, owner and planned workload. Table, calendar and resource views make preparation clear.

Preparing for tax season starts by making each deadline visible, assigned and understandable.

PRIORITISE BEFORE THE PEAK

Compare progress and capacity while there is still time to act.

Spot blocked engagements, workload drift and approaching deadlines. Choose the right action without rebuilding the workload plan.

Portfolio obligations

Deadlines, owners and progress in one view

ILLUSTRATIVE PORTFOLIO

THIS WEEK	COMPLETED	TO DO	TO MONITOR
48	31	14	3

OBLIGATION	OWNER	STATUS
VAT return	Camille R.	Completed
Monthly review	Yanis L.	In progress
Additional documents	Sofia M.	Follow up

ONE ACTION, TWO LINKED RECORDS

Complete the obligation when entering time

When recording the associated time, mark the obligation as completed. Progress tracking stays linked to the work actually performed.

Enter
Time on the engagement.

Complete
The associated obligation.

Track
Updated progress.

A document is missing
Identify the blocking prerequisite and request the document from the right person.

A team is overloaded
Reassign an obligation or adjust a priority based on remaining capacity.

A deadline is approaching
Send a targeted reminder and assign the next action to an owner.

ORGANISATION AND INTEGRATIONS

Build a lasting management rhythm beyond tax season.

Tempolia links obligations, events, engagements and workload to the firm's tools, keeping your organisation effective throughout the year.

A coordinated season in four views

Calendar, workload, staff and deadlines stay in sync

ILLUSTRATIVE PLAN

CALENDAR	WORKLOAD	STAFF	DATE
VAT · Altura		Camille	9 Sept.
Review · Orion		Sofia	10 Sept.
Accounts · Novalis		Yanis	11 Sept.
Documents · Horizon		Thomas	Reminder

DECISIONS

- Engagement priority
- Workload to move
- Backup to confirm
- Prerequisite missing

Owner + date

SUPPORTING THE PROFESSION

Tempolia, a CJEC partner

Supporting newly qualified French chartered accountants as they establish and grow their firms.

The partnership on tempolia.com

Profiles and responsibilities

Tailor creation, assignment, approval and viewing to each person's role.

Team coordination

Organise owners, backups, teams and sectors around the same portfolio.

Calendar and data exchange

Reuse relevant events and data in the tools chosen by the firm.

Templates and rules

Build on validated obligations, planned workloads and allocation decisions.

MANAGEMENT FRAMEWORK AND INTEGRATIONS

Define a review rhythm, alert thresholds and reassignment rules the whole team understands.

Exports, APIs and calendar integrations are assessed against the environment, responsibilities and agreed scope.

Manage tax season with greater visibility and confidence.

Let's test the approach on a portfolio, its actual deadlines and the team's capacity.

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+33 1 43 79 25 18