Checklist: Self-assess your short-staffed team's capabilities

This checklist helps you assess your team's current capabilities and identify areas that need immediate attention and improvement. Consider each point as a prompt to trigger reflection, analysis, and proactive action:

- [ ] **Evaluate current staff:** Which skills does your team possess? Are there gaps you need to address? No one is perfect and almost all of us want to grow. Make it easier and transparent:. Make a list of what each person needs to work on and rank it, so that you and that person can tackle one thing at a time. Using this as part of your performance management system can motivate your team to improve their skills.
- [ ] **Review workflow processes:** Are there bottlenecks or inefficiencies in your current workflows? Bring your team together and identify each key workflow. Write down the key steps in each workflow and ask the team three questions for each step:

    1. How much effort does this step require?
    2. Does this step add value to the process?
    3. Can this step be done more efficiently?

    Then give the owner of each process the opportunity to make changes that either reduce the effort, add value or increase efficiency.

- [ ] **Assess data accuracy:** How often do errors occur, and where are they most likely to happen? Data is often at the core of many challenges and arguments. If your data isn't trusted, there are multiple versions, or the data doesn't provide the full context — you have a data problem! The best way to tackle it is to compile a list of the data sources you rely on and identify any recurring errors you find, gaps in them, or where you have multiple sources. Once you know the main sources, you can rank them from most to least critical, how much rework they cause, and trace duplicates back to the source. Identify those that are causing the most pain and who owns them, then work with them to come up with ways to reduce the challenges.
- [ ] **Determine capacity:** With current staffing levels, what's the maximum transaction volume your team can handle efficiently? Start by capturing the volume in each of the data sources you work with. Use the list of workflows and data sources you produced in steps 2 and 3 and add details on current volume and the growth you anticipate. Then add estimates from your team on how much time they spend each month or quarter working with that data. Obviously those that suck up the most time, and where volume is growing should be prioritized for the next step.

- [ ] **Spot automation potential:** Which tasks consume the most time and could benefit from automation? Using the information you have been collecting, selecting one to three workflows, data sources, or tasks to automate that will create efficiency fastest to alleviate some painful spots and show success. It's easier to automate areas that might require change management if you've already got positive momentum to build on

- [ ] **Understand team morale:** How is the team coping with the increased workload? What support systems are in place to help them manage? One of the most critical steps in handling lean teams is to increase communication and teamwork to get things done. Consider processes that are bottlenecks — can others step in to help? Or maybe you can adjust an upstream workflow so that things are better prepared? Or automate some of the steps? If you determine certain tasks that are causing a lot of pain, you may need to give the folks involved a vision of a better future and get them involved in solving their challenges. Most people don't actually fear change: they fear *losing control.*

- [ ] **Gauge training needs:** Are there areas where the team requires further training or professional development to cope with the changes? One of the best ways to prepare your team to handle the ever evolving nature of our jobs is to engage them in the transformation. Give them a say. It will help them cope and likely result in net time savings, as they may not require training at all.

- [ ] **Analyze your strategic focus:** Are strategic tasks receiving enough attention, or is the focus mainly on transactional activities? Most accountants want to be good business partners and add strategic value. But when folks spend too much time processing details, troubleshooting data issues or handling month end processes, it can be hard to prioritize support for operating teams. Start with checking in with both your team and the folks in the operations groups — are they getting enough time and information to do their jobs well? If they are, you're golden! More likely than not they aren't, so prioritize the kinds of value add services you can provide and start small: add an hour or two a week of serving up data, then another to discuss their priorities and find ad hoc support you can provide. Each small step moves you toward prioritizing these activities and provides value.
- [ ] **Contemplate the future:** How will your team manage as the business scales and transaction volumes increase? How will you adopt technology? What can you do now to get ready? Maybe you can take some baby steps that free up a few hours here and there for your team. Prioritize activities that you can add in small bites.