

Is It Time For A



Brain Dump?

Leslie Liondas, CPA

Are you suffering from brain overload?

I think we all suffer from brain overload. There is so much coming at us from so many different directions. We have clients asking us questions that they expect us to know the answer to. For those of us with a team, we have team members that are constantly asking us questions. What if I told you that there was a way to work towards getting all this stuff out of your head? If someone would have told me that years ago, I would not have believed them. Now I know it is possible.

What do you have living in your head?

Many of us have all kinds of client information stored in our head. This ranges from what entity type they are, to the history of their company, to all their family information to name a few. For most of us, we know so much about our clients that we think it would be almost impossible to pass that information on to someone else. Or that is what I used to think.

Do any of the following sound familiar to you?

- Client history from the time you took them on as a client to current
- All the little details that go with their history
- Things about their team members
- Our team members
- Your client's customers, etc.
- Information you learn from client meetings
- Tasks that you need to do not only for your clients,
- How to do those tasks for your clients
- Tasks you need to do for your own business & personal life
- How to do the tasks for your own business
- Any new courses that you take to improve your business. Do you do anything with them or do they hang out in your brain?

This is just a short list. I am sure if you think about it there is so much more living within your brain. No wonder you feel like you cannot store any more information in your head.

What holds you back from getting information out of your head?

For many accountants, bookkeepers, and tax professionals the answer I hear most often to this question is "I don't have time." I get it, that was me. Either I can spend the time doing the work or getting out of my head, but I cannot do both. I had a laundry list of reasons why I could not get the information out of my head. I have listed some, how many can you relate to?

- There are not enough hours in the day
- I am exhausted and do not have the mental capacity to document anything
- It is too time consuming to get started and I have no idea where to start
- It is too overwhelming because there are so many to document

- It takes too much time to document everything
- It is just me so why would I document them.
- No one else will do the work but me
- I don't even know what information that I have that no one else has

I used to think it had to be one or the other. But now I know differently!

What happens if something happens to you?

I used to work for my mother, prior to obtaining my CPA license and then my mother worked for me until I had to fire her back in 2016. That alone is a whole other article ([How I had to Fire My Mother](#)). Let me explain for a second on why I am bringing this up. My mother had a stroke this past January and was hospitalized for 2 weeks. I had to figure out what clients needed 1099's filed still and what payroll reports needed to be filed by 1/31. This was not an easy task since I did not know what she did for each client, and she was not mentally able to really give me much help. Imagine your family trying to figure this out if something happens to you. My mother was fortunate that we work in the same industry. This was a stressful time for me trying to take care of my mother, her business and not to mention my own.

Luckily before this happened, I had documented what we did and how we did it for each client. My team was able to take care of my business in my absence. I had learned years ago that this was one of the most important things that I could do for my business. This was not an option for me. I never wanted my business to be dependent on me or any team member. This way if anything happened to anyone within my business, my business would continue as usual. Someone else could step in when I had to step out. This experience made me realize just how important it is to document what it is that we do for each client. Not only how to but what we do. If we were not in the same industry, could you have imagined the mess and chaos it would have created! Not just for her clients, but my clients also.

Will your business be sellable when you are ready?

I know selling my business was not something I really thought about. I looked at it as a way to make a living, you know a job. I did not think about the personal and financial investment that I was putting into it. Wouldn't it be nice to get that investment back plus some? If your business is completely dependent on you, how sellable will it be?

If you have your business where someone can just take over your client load and there is not much they need you for, how much more is it worth to the party buying it?

Many people I talk to have never even thought about that just as I never did. They just keep working and working from day to day without thinking about the end result. That point you reach when or if you decide it is time to retire. Many of us are in the same situation as my mother. What situation is that? Her business is 100% dependent on her and when she cannot work, no work gets done. It is all there waiting on her when she does or can work. What is the likelihood that someone wants to buy that business? Wouldn't they rather buy a business that just runs itself?

Can you really take unplugged time off from your business without planning?

I ask people this question in the accounting industry all the time and most say they can but for a very short, planned out period of time.

What do I mean when I say unplugged time from your business?

- No phone calls or text from clients
- No phone calls or text from team members
- No communication from any platform from your business
- No working at all

Think about my story above with my mom. That event was unplanned for both of us. Yes, I was able to communicate with my office, but it was not very focused and sporadic. I needed to be present with what she needed and could not focus on anything else.

Think of a time where you really needed to take care of something personally, but you kept getting phone calls or text messages. You had people needing this or that. You resented the feeling at the time but did you ever solve the problem so it would not happen again?

How many times have you been on vacation, and you have had to make your family wait on you because you had to “wrap something up?” That was me. I would be on vacation with my daughters, and they would be waiting on me to go to the beach. I would have to tell them to wait, “I have to file this sales tax report first” or “I have to call this client really quickly”. I was just the only one that could file the report or answer that client and there were so many other situations like this.

This should not be your vacation or time off, you should be able to be fully present in your vacation, child's school/sport event or family function, or any time off. Now I can take multiple weeks off from my business at a time. Rather it is to take a vacation or work on my business away from my business and it will continue to run smoothly without me. This was one of the best investments in my business that I could have made.

If you want to learn more about getting stuff out of your brain, go to the article [“How To Start Getting \\$h*t Out of Your Head”](#) where I share how to get started. I also share a blueprint that you can use to get information out of your head.

Click here for a copy of: [GET IT OUT OF YOUR HEAD BLUEPRINT](#)

If you want help getting started, book a strategy call with us.

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