

Checklist for end of year finance team survival

The end of the year is almost here, and with December 19th being the busiest expense day last year, we know your work is really starting to heat up. Don't stress! Use this handy checklist to reduce distractions, increase productivity, better communicate with your team and finish the year out strong (not to mention prepare for a better 2018).

Set the Stage

Start by reducing distractions so you can focus on the tasks at hand.

- Turn off messaging and phone alerts, turn on email auto-responder** – schedule at least one hour per day of distraction free working
- Schedule social media time** – taking a social media break is OK, just not every 5 minutes. Allow yourself only a few times each day to check and post updates
- Allow for breaks, especially lunch** – don't burn the candle at both ends, take a walk, don't eat lunch at your desk (if you can help it), get a cup of coffee with a coworker
- Stay hydrated** – drink plenty of water and stay healthy!

Prepare your team

Taking time now to address questions and concerns will make for a smoother busy season.

- Hold a year-end planning meeting** – gather your team together and create a game plan for tackling the next few weeks
- Open the doors of communication** – make it clear your team knows how to get ahold of you and each other when questions or concerns arise
- Create a vacation calendar** – make sure everyone knows who will be out of the office and when

Maximize productivity, improve your expense processes

By evaluating your current expense process, making necessary updates and moving to an automated and mobile system sets you up for future success.

- Review your current expense process** – look for opportunities for improvement, ensure you are set up for successful automation
- Implement small process changes** – cut out unnecessary steps and update out-of-date policies to be more relevant
- Look for opportunities to automate now** – time to kiss Excel goodbye...
- Plan for automation next year** – make note of processes that can be automated, and the tools you need to make this happen
- Consult a technology partner** – Concur's here to help! We can review your current situation, make recommendations and create a short-term and long-term plan

Reward yourself and your team

There's a light at the end of the tunnel, make sure to schedule some kind of celebration for you and your team.

- Treat your team** – whether it's coffee, cookies or lunch, show your team your appreciation
- Treat yourself** – you deserve it!
- Set that out-of-office** – taking much deserved time off? Don't forget to set your out-of-office, and RELAX!

This checklist doesn't have to stop at the finance department. Share it with other teams, so they too can end 2017 feeling more accomplished.