How Accounts and Legal improves their planning to deliver crucial work using Float

ACCOUNTS AND LEGAL TEAM CONTRIBUTORS

Clara Tooth
Manager

INDUSTRY	PEOPLE SCHEDULED	ROLE TYPES SCHEDULED
Consultancy	>40	Accountants and legal consultants

Accounts and Legal is a UK-based consultancy firm, one of the few that specializes in both accounting and legal services.

Working "from a leaky-roofed London office" in 2015, the team of accountants, lawyers, and tax specialists expanded over the years to open three more offices in Brighton, Liverpool, and Manchester—a journey that won them the Xero large firm of the year award in 2023!

Because of the nature of their industry and the size of their clientele, they need to deliver work under strict deadlines and in-between many client calls.

This is why they found an ally in Float, which entered their lives as their resource planning tool in early 2022.

Clara Tooth, one of the managers at Accounts and Legal, doesn't mince her words: "We love Float. We'd be lost without [it]."

High standards need reliable tech

Clara explains that Accounts and Legal "isn't your traditional accountancy firm. We go above and beyond the standard compliance work in much of what we do."

Along with their standards of excellence, they also deal with urgent tasks popping up or matters that suddenly need extra attention.

When that happens, they need to quickly know who can take some extra work or easily reprioritize tasks.

> **Before Float, we used a lot of to-do lists and task management, but many times, we all felt we didn't know what we were doing. We didn't know what to prioritize. We needed to see something visually and allow the team to say, hang on a minute, what you're asking for can't be done today but it can be done tomorrow.**

Float gives them the flexibility to make quick changes that are visible to everyone on the team, allowing them to pivot effectively when needed. "The ball has never been dropped," says Clara.

Planning ahead for the month + keeping track of the day

While some work is impossible to predict, Clara's team ensures they got their planned work down.

There are two main practices of the team's planning processes: monthly workload planning and daily Float calls.

🎯 Monthly planning

"We all sit down once a month and plan the workload of our next month," says Clara. The team determines what deadlines and deliverables they need to hit, and goes through other client requirements to work out the priorities for the month.

Then, they pop tasks and dates into Float and everyone can easily see what they need to get done in the month ahead.

📅 Daily meets

The "Float call" is a growing trend among our customers.

At Accounts and Legal, the ritual started when the team needed help with prioritization from their managers. Now, they all meet for a daily 15-minute meeting: someone shares their screen with the Float schedule, and they have a conversation around these questions:

✔ What did we do yesterday?
✔ Is there anything that took longer than anticipated or got done quicker?
✔ What are we doing today and can it get done?
✔ Does anyone need any support?
✔ Is there any capacity or is anyone overloaded with work?

This enables everyone to keep on top of things without managers having to pressure or chase anyone for updates throughout the day. Every team member proactively speaks up when something is taking longer, and they all work collaboratively to move tasks around and help each other.

> We all know what we're working on, who's busy, and who's available. It gives the whole team visibility into what their responsibilities are and lets everyone see how their colleagues are doing. That way, they know who to go to for support if they need it.

Accounts and Legal grew 2x the past year after Float helped them understand their hiring needs

The firm underwent massive growth in twelve months, and Float was there to help them realize when to hire.

> ## "Every time we feel that pressure and there isn't much spare time [in our schedules], that's when we [hire].

Float helped the managers stay across their team's needs. The schedule shows when people are working overtime or struggling to complete projects because of workload.

"When we were planning," explains Clara, "we could see that there were more and more clients, things were getting tighter and tighter. That expresses the need to recruit."

A particular Float feature that has come in handy is the ability to assign roles to people. This enables managers to see when the capacity for a certain role is almost full, indicating the need to hire for that role.

"Without Float, we wouldn't have been able to find the right talent."
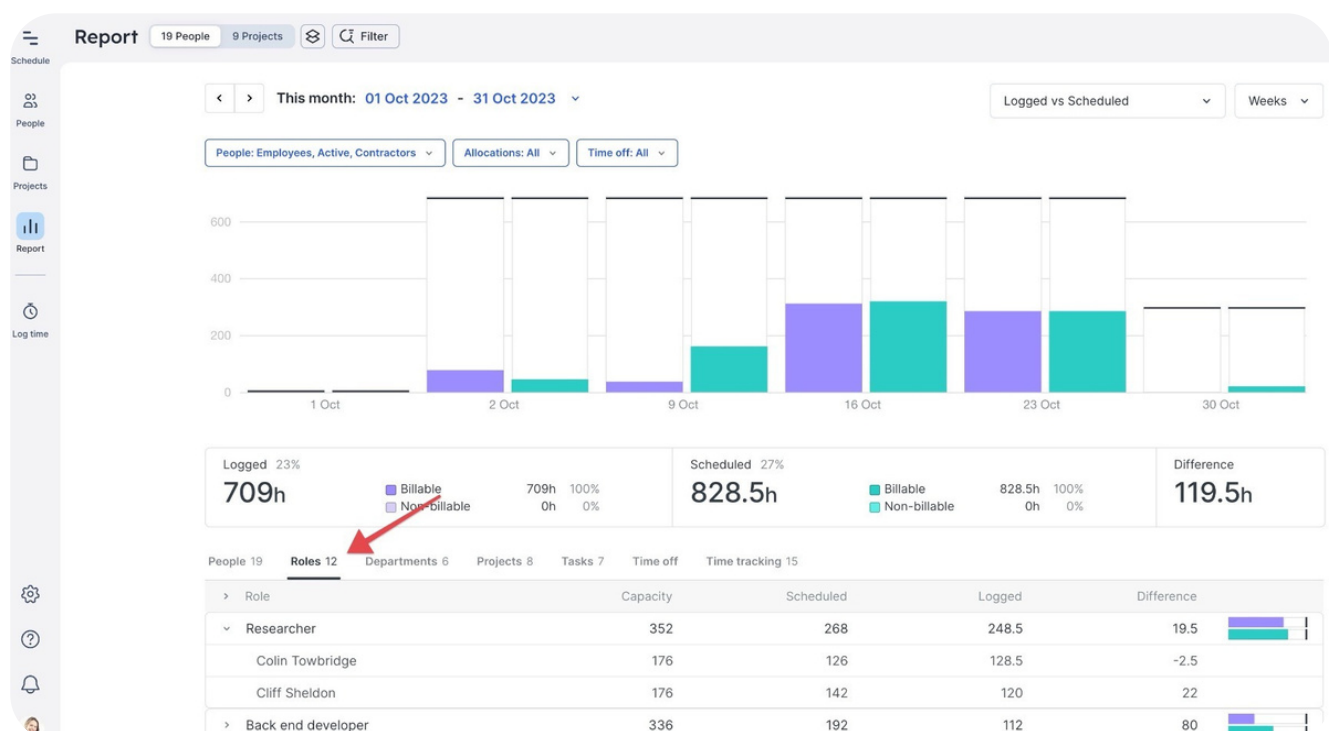
Work is transparent, collaborative, and with little stress

In most lines of work, the complete absence of stress may not be possible—but Accounts and Legal has gotten really close!

Clara emphasizes that Float helps reduce stress by showing an accurate view of real capacity: "When you go over hours, it shows up red and you're like, okay, this is too much for one person. It prevents overbooking before it even happens."

And because everyone's schedule is transparent, planning realistically is easier—which allows the team to give answers to clients about when work can get done, instead of leaving them on hold.

Even planning small tasks makes it easier to keep on top of the workload

For example, if Clara needs to call a client for 10 minutes, she just schedules it in Float. "I put 15 minutes on my Float and I won't forget to call them. I don't have to write a to-do list, I don't have to put a calendar reminder, it's in there, so it'll get done."

And finally, what does Clara say to other accounting firms considering trying a resource planning tool like Float? Simply and beautifully put: Go for it—you won't look back.

"I've never [before] worked in a place where I know exactly what I need to do each day. I'm not worrying about prioritizing. I know exactly what I'm doing—my whole team does—and everything gets done.
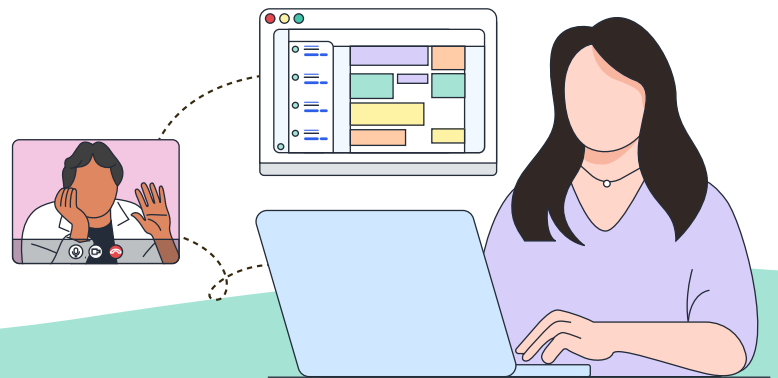
About Float

Float is the #1 rated resource planner used by 4,500+ teams globally. Designed for agency teams, Float gives you an accurate view of everyone's capacity so you can plan projects and allocate work with confidence. Pre-filled timesheets make time tracking a breeze. Keep your data in one place to make better planning decisions. Try for 30 days free—no credit card required.

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