In this issue

Cybersecurity Awareness for Offices During Tax Season

Why February Is a High-Risk Month for Phishing—and How You Can Protect Your Organization

February may feel like a quiet, in-between month, but from a cybersecurity standpoint, it's one of the busiest—and riskiest—times of the year for offices in every sector. As an office manager, you're right at the center of this risk. Tax season is ramping up, financial data is moving back and forth, and cybercriminal know it. They take advantage of the increased activity, tighter deadlines, and general stress that come with this time of year to launch phishing attacks that are surprisingly effective.

Understanding why February is such a high-risk month is the first step. The second—and more important step—is making sure your office is prepared.

During tax season, your organization is handling more sensitive information than usual. Payroll records, employee Social Security

1

Cybersecurity Awareness for Offices During Tax Season

numbers, vendor payment details, and tax documents are all in play. That creates the perfect environment for phishing emails that look legitimate. Messages claiming to be from the IRS, a payroll provider, a bank, or even your own leadership team can slip past a busy employee who's focused on getting things done quickly. One click on a fake link or one reply to a fraudulent email can expose your entire organization.

What makes February particularly dangerous is timing. Many offices are finalizing W-2s, responding to employee questions, and coordinating with accountants or tax professionals. Phishing emails are often crafted to match these exact scenarios—"urgent payroll correction needed," "updated tax form attached," or "immediate action required to avoid penalties." When an email aligns perfectly with what your team is already working on, skepticism tends to drop.

You don't need to be a cybersecurity expert to reduce this risk. You do, however, need to set clear expectations and put simple safeguards in place. One of the most effective things you can do is remind your team—early and often—that tax season scams are real and common. A short email or quick staff meeting in February that says, "This is peak phishing season—slow down and double-check emails," can make a real difference.

Encouraging a culture of pause is key. Let your staff know it's okay to take an extra minute to verify a request, even if it claims to be urgent. In fact, that pause should be expected. If an email asks for sensitive information, changes payment details, or includes attachments related to taxes or payroll, employees should know to verify it through a second channel, such as a phone call or direct message to a known contact.

You'll also want to make sure your internal processes support safe behavior. If only one person handles payroll or tax filings, that person becomes a prime target. Consider adding a verification step for any request involving financial or personal data. Dual approval for payment changes or document transfers can stop a phishing attempt in its tracks, even if someone clicks before realizing something is wrong.

Technical protections matter too, but they don't have to be complicated. Make sure software updates are current,

Cybersecurity Awareness for Offices During Tax Season

antivirus tools are active, and multi-factor authentication is enabled wherever possible—especially for email and financial systems. Many phishing attacks succeed simply because an attacker gains access to an email account and then uses it to target others internally. Extra login protection can prevent that domino effect.

Don't overlook the importance of reporting. Your team should know exactly what to do if they suspect a phishing attempt—or if they think they may have clicked something they shouldn't have. Removing fear or embarrassment from the equation is critical. The faster an issue is reported, the easier it is to contain. Make it clear that reporting a mistake quickly is far better than staying quiet and hoping nothing happens.

Finally, use February as a checkpoint. Tax season is a natural reminder that your office handles valuable data year-round, not just during filing deadlines. Take a moment to review your policies, refresh training, and identify any weak spots before a real incident forces the issue.

Cybercriminal count on distraction, urgency, and routine. As an office manager, you're in a unique position to interrupt that pattern. By raising awareness, reinforcing simple habits, and setting up practical safeguards, you can significantly reduce your organization's risk—not just during tax season, but all year long. ■

Case Study: A Small Fix That Created Big Savings in a Small Insurance Office

When you work in a small insurance office, there's rarely a single, dramatic problem to fix. Instead, it's the quiet, everyday inefficiencies—the ones that don't seem urgent—that slowly drain time, money, and energy. That was exactly the situation in this office.

On the surface, everything looked fine. Policies were processed on time. Clients were served. The office ran without obvious crises. But as the office manager, you could feel the friction. Supplies ran out unexpectedly. Vendor invoices varied month to month with no clear explanation. Staff complained about scheduling gaps and last-minute scrambles. None of it felt big enough to raise alarms—but together, it added up.

The Challenge: Death by a Thousand Small Cuts

The office employed fewer than 15 people, which meant everyone wore multiple hats. Leadership assumed costs were "just part of doing business." No one had time to question long-standing contracts or habits that had developed over years.

You noticed a few patterns:

➤ Office supplies were being ordered reactively, often at premium prices.

Case Study: A Small Fix That Created Big Savings in a Small Insurance Office

> Vendor contracts had auto-renewed for years without review.

> Staff schedules weren't aligned with peak call times, leading to overtime in some weeks and idle time in others.

Individually, each issue seemed minor. Together, they created unnecessary spending, frustration, and inefficiency.

The Office Manager's Role: Seeing What Others Missed

You didn't start with a sweeping overhaul. Instead, you paid attention to the details most people overlooked.

You began tracking expenses over three months, categorizing costs that had previously been lumped together. You compared invoices, reviewed contract terms, and quietly noted patterns in staff workload throughout the week.

Rather than framing these issues as "problems," you treated them as opportunities to fine-tune operations—something small offices often don't think they have time for.

The Actions Taken: Simple, Strategic Adjustments

Vendor Contract Review
You reviewed every recurring vendor contract—IT support, cleaning services, shredding, and office supplies. Several contracts were outdated or priced for larger offices. By requesting updated quotes and renegotiating terms, you reduced monthly service costs without sacrificing quality.

Smarter Supply Ordering
You created a basic inventory checklist and established reorder points for commonly used supplies. Instead of last-minute orders from multiple vendors, you consolidated purchases and scheduled monthly orders with negotiated pricing.

Schedule Alignment
By analyzing call volume and workflow patterns, you adjusted staff schedules slightly to better match peak client activity. This reduced overtime and eliminated slow periods where employees had little to do.

Clear Documentation
You documented these changes and created simple guidelines so the improvements wouldn't disappear if someone was out sick or left the company.

The Results: Big Impact from Small Fixes

Within six months, the results were clear.

> Operating costs dropped noticeably—enough to show up in quarterly financial reviews.

> Overtime expenses decreased without reducing service levels.

> Staff felt less stressed and more supported during busy periods.

> Leadership gained confidence that operations were being actively managed, not just maintained.

Perhaps most importantly, leadership began asking for your input earlier—before decisions were finalized—because they saw how your attention to detail directly affected the bottom line.

The Takeaway: Office Management Is Strategic Work

This case study highlights something many office managers already know: you don't need a massive budget or authority over major decisions to make a meaningful impact. You create value by noticing what others overlook and taking thoughtful, practical action.

In a small insurance office, where margins matter and resources are limited, those "small fixes" can be the difference between barely getting by and operating efficiently. When you manage details with intention, you don't just keep the office running—you make it stronger.

And that's real leadership. ∎

Creative Office Manager

MANAGER'S TOOLBOX

The First 30 Minutes of Every Monday – Office Manager Checklist

A quick-start productivity tool to help you take control of the week before the week takes control of you. Use this checklist to get organized, prioritize effectively, and set your team up for a successful week.

Manager's Monday Morning Checklist

Minute 0–5: Get the Lay of the Land

✔ Review today's staffing levels and schedules

✔ Confirm coverage for planned PTO, remote work, or late arrivals

✔ Check for any last-minute callouts or schedule changes

✔ Note workload pressure points or departments that may need support

Goal: Ensure the office is adequately staffed and operational for the day.

Minute 5–10: Scan for Urgent Requests

✔ Review emails, messages, and ticket systems for urgent items

✔ Identify anything time-sensitive, deadline-driven, or client-facing

✔ Flag requests that require immediate action vs. same-day follow-up

✔ Acknowledge receipt of urgent issues where appropriate

Goal: Prevent small issues from becoming Monday-morning fires.

Minute 10–15: Check Leadership Communications

✔ Review messages from executives, partners, or senior leadership

✔ Note new priorities, deadlines, or meetings impacting the team

✔ Identify any information that needs to be relayed to staff

✔ Flag items requiring clarification or follow-up

Goal: Stay aligned with leadership expectations before the day accelerates.

Minute 15–20: Triage Fires vs. Strategic Work

✔ Identify immediate "fires" that could disrupt operations

✔ Separate reactive tasks from strategic priorities

✔ Decide what must be handled today vs. scheduled later

✔ Delegate or defer appropriately

Goal: Avoid spending the entire day in reactive mode.

Minute 20–25: Set Your Top 3 Priorities

✔ Identify the three most important tasks or goals for the day

✔ Align priorities with leadership directives and team needs

✔ Communicate any critical tasks to staff as needed

✔ Ensure each priority has a clear owner or deadline

TOOLBOX:
Technology and equipment maintenance checklist for a law office

continued from page 4

Goal: Focus your energy on what will make the biggest impact today.

Minute 25–30: Quick Team Check-In

✔ Touch base with key team members to confirm readiness and support needs

✔ Address any immediate questions or obstacles

✔ Reinforce priorities and expectations for the day

✔ Offer encouragement and clarity to set a positive tone

Goal: Start the week with clarity, alignment, and momentum.

Tip: Treat this 30-minute ritual as your Monday morning anchor. By taking just a half-hour to review staffing, prioritize tasks, and check in with your team, you'll move from reactive to proactive, reduce stress, and set a strong tone for the week ahead. ■

Training New Hires Who Started in January: What Month Two Should Look Like

How to strengthen onboarding beyond week one

By the time February rolls around, your January new hires are no longer "brand new." They've survived their first week, figured out where the coffee lives, learned how to log into systems, and can probably get through a day without constant help. This is exactly where onboarding often loses momentum—and where your role as an office manager becomes even more important.

Month two isn't about information overload. It's about confidence, competence, and connection. If week one was about orientation, month two should be about integration.

First, this is the time to shift from explaining tasks to explaining *why* things are done the way they are. In January, new hires are focused on not making mistakes. In February, they're ready to understand priorities, workflows, and decision-making logic. Walk them through how their work fits into the bigger picture. When people understand the purpose behind procedures, they make better choices and need less supervision.

Second, month two is ideal for reinforcing expectations—without sounding corrective. Instead of waiting for problems to surface, schedule a short check-in focused on clarity. Ask what feels confusing, what still feels intimidating, and what they think success looks like in their role so far. This isn't a performance review; it's alignment. Many early mistakes happen simply because expectations were assumed, not stated.

This is also the moment to deepen skills training. During week one, new hires learn *how* to do tasks. In month two, they should start learning how to do them efficiently and

Training New Hires Who Started in January: What Month Two Should Look Like

independently. That might mean introducing advanced features of software they're already using, showing shortcuts, or walking through real-world scenarios they didn't encounter during their first few days. Gradual skill-building prevents frustration and helps employees feel like they're genuinely progressing.

Another key focus in month two is feedback—both giving it and encouraging it. New hires are often hesitant to speak up early on, especially if they're still trying to make a good impression. Let them know explicitly that questions, suggestions, and even gentle challenges are welcome. When you model openness now, you're setting the tone for communication long after onboarding officially ends.

February is also a great time to assess workload balance. In January, you may have intentionally limited assignments to avoid overwhelm. By month two, it's appropriate to increase responsibility—but thoughtfully. Pay attention to where someone is thriving and where they're struggling. Small adjustments now can prevent burnout, disengagement, or bad habits from forming later.

Don't overlook relationship-building during this phase. New hires may know who people are, but they may not yet feel like part of the team. Encourage collaboration, invite them into conversations, and, when possible, pair them with experienced staff for informal mentoring. A sense of belonging is often what turns a new employee into a long-term one.

Finally, use month two to set short-term goals. Clear, achievable goals give new hires something concrete to work toward and give you a natural way to measure progress. These goals don't need to be ambitious; they just need to be clear. When people know what "doing well" looks like, they're far more confident—and far more engaged.

Strong onboarding doesn't end after the first week. Month two is where training becomes traction. By focusing on clarity, confidence, and connection, you help your January hires move from simply showing up to truly contributing—and that's a win for them and for your office. ∎

Time Mastery for Office Managers: Work Smarter, Not Harder

Effective time management is essential for any office manager. Balancing multiple responsibilities, meeting deadlines, and leading a team requires careful planning and efficient use of your time. Here are some practical time management tips to help you stay organized and productive in your role.

Prioritize Tasks

Start by identifying and prioritizing your tasks. Not all tasks are created equal; some are more urgent or important than others. Use techniques like the Eisenhower Matrix to categorize tasks into four types: urgent and important, important but not urgent, urgent but not important, and neither urgent nor important.

For example, if you have a project deadline approaching and a routine staff meeting, prioritize the project over the meeting. Focus on high-impact tasks that drive results and contribute to your objectives.

Time Mastery for Office Managers: Work Smarter, Not Harder

Plan Your Day

Begin each day with a plan. Outline your key tasks and allocate time for each one. Use a daily planner or digital calendar to schedule your tasks and appointments. This helps you stay organized and ensures you allocate enough time for important activities.

Consider using time-blocking techniques to segment your day into blocks of focused work, meetings, and breaks. For instance, you might block off two hours in the morning for project work and schedule meetings in the afternoon.

Delegate Effectively

As an office manager, you don't have to do everything yourself. Delegating tasks to your team not only frees up your time but also empowers your team members and develops their skills. Identify tasks that can be handled by others and assign them accordingly.

When delegating, be clear about expectations, deadlines, and deliverables. Provide the necessary resources and support to ensure your team can complete the tasks effectively. Regularly check in to monitor progress and offer assistance if needed.

Avoid Multitasking

While it might seem like multitasking helps you get more done, it often leads to decreased efficiency and increased errors. Focus on one task at a time and complete it before moving on to the next. This approach, known as single-tasking, improves the quality of your work and reduces stress.

For example, if you're drafting a report, give it your full attention without checking emails or handling other tasks simultaneously. Once the report is finished, move on to your next task with a clear mind.

Set Boundaries and Limit Distractions

Create boundaries to protect your focused work time. Inform your team about your availability and set specific times for meetings and interruptions. Use tools like "Do Not Disturb" features on your communication platforms to minimize distractions.

Additionally, identify common distractions, such as social media or non-urgent emails, and limit their impact on your productivity. Set designated times to check emails and handle administrative tasks, rather than responding to them throughout the day.

Use Technology Wisely

Leverage technology to streamline your time management. Tools like project management software, calendar apps, and task management systems can help you organize your tasks, track progress, and set reminders.

For instance, use a project management tool like Asana or Trello to keep track of tasks, deadlines, and team responsibilities. Automation tools can also help with repetitive tasks, freeing up more time for strategic activities.

Implement the Two-Minute Rule

The two-minute rule is a simple yet effective time management technique. If a task can be completed in two minutes or less, do it immediately. This prevents small tasks from piling up and keeps your to-do list manageable.

For example, if you receive a quick request from a team member or need to send a brief email, handle it right away if it takes less than two minutes. This approach helps maintain momentum and keeps you focused on more significant tasks.

Time Mastery for Office Managers: Work Smarter, Not Harder

Reflect and Adjust

Regularly reflect on how you're managing your time and make adjustments as needed. At the end of each day or week, review what worked well and what could be improved. Adjust your strategies and priorities based on your reflections to enhance your time management skills.

Consider keeping a time log to track how you spend your time and identify areas where you can improve. Use this information to make informed adjustments to your schedule and workflow.

Effective time management is crucial for office managers to handle their diverse responsibilities and lead their teams successfully. By prioritizing tasks, planning your day, delegating effectively, avoiding multitasking, setting boundaries, using technology, implementing the two-minute rule, and reflecting on your practices, you can enhance your productivity and maintain a well-organized office. Mastering these time management tips will not only help you stay on top of your tasks but also contribute to a more efficient and harmonious work environment. ■

What Office Managers Should Know About AI and Automation This Year

You're already juggling priorities, people, projects, and possibly pointless meetings—and now you're hearing more about AI and automation than ever before. It can feel intimidating, but you don't need a tech degree to make AI work for you. The key is knowing *practical ways* it can help, *risks* to watch out for, and *policies* you should put in place so your team and organization stay secure and productive.

Practical Use Cases for AI and Automation

AI isn't just a buzzword — it's a tool that can streamline real tasks you manage every day. Here are ways office managers can use it in *any* professional setting:

1. Administrative Workflows
AI can automate repetitive tasks that eat hours out of your week:

➤ **Scheduling meetings** — AI assistants can find open slots across calendars, propose times, and even send invites.

➤ **Email triage and drafting** — AI tools can help draft responses, prioritize incoming emails, and summarize long threads.

➤ **Document creation** — From standard contracts to meeting agendas, AI can generate rough drafts you can then finalize.

2. Data Organization and Reporting
AI can quickly extract insights from data and turn them into usable reports:

➤ Generate weekly performance summaries.

➤ Highlight trends in budget use or operational bottlenecks.

➤ Create visuals like charts and dashboards without advanced spreadsheet skills.

3. Knowledge Management
Instead of hunting through old files:

➤ **Automated indexing** and **search tools** can help employees find documents fast.

What Office Managers Should Know About AI and Automation This Year

continued from page 9

➤ You can use AI to build internal FAQs or chatbots that answer common staff or client questions.

4. Onboarding and Training

Automation can standardize key parts of bringing new people on board:

➤ Deliver training modules on schedule.

➤ Provide reminders and checklists.

➤ Track progress without manual follow-ups.

5. Customer or Client Interaction

If your office interacts with clients:

➤ Chatbots can handle basic inquiries off hours.

➤ Automated follow-ups ensure satisfaction surveys and reminders go out like clockwork.

These use cases are *not futuristic* — they're tools your peers are already using to save time and reduce errors this year.

Risks Every Office Manager Should Watch

AI and automation can boost productivity, but they also introduce new challenges:

1. Data Privacy and Security

AI tools often access sensitive information. If you're feeding emails, client details, or financial info into a third-party tool:

➤ Make sure that data is encrypted.

➤ Understand where it's stored and who can see it.

➤ Be cautious with tools that don't clearly explain their security protocols.

2. Accuracy and Bias

AI does not think—it patterns. That means:

➤ It can generate *plausible but incorrect* information.

➤ Models trained on biased data can produce biased outcomes. Always *verify* output and don't rely on AI for decisions where accuracy is mission-critical.

3. Loss of Human Touch

Automation is great for routine work, but:

➤ Over-automating communication (e.g., customer outreach) can feel impersonal.

➤ Always balance efficiency with empathy and tone.

4. Dependency Without Understanding

You want tools to help you—not to replace your expertise. If AI becomes a "black box" you don't understand:

➤ You risk making decisions you can't defend.

➤ You may struggle when the tool changes or goes offline.

Policy Considerations to Put in Place

To manage risk and encourage responsible use, you'll want clear policies around AI:

1. Tool Approval Process

Create a simple process for evaluating and approving AI tools before a team starts using them. Consider:

➤ Security review

➤ Data privacy compliance

➤ Integration needs

➤ Licensing costs

This protects you from rogue tools that slip into workflows without oversight.

2. Data Handling Guidelines

Define what kinds of data can and cannot be entered into AI systems. For example:

➤ Never enter client personal information without consent.

➤ Avoid uploading proprietary or legal documents unless the tool meets compliance standards.

What Office Managers Should Know About AI and Automation This Year

3. Training and Documentation
Give your team clear, practical guidance:

- When to use AI and when not to.
- How to review AI outputs.
- Who to contact if something seems off.

Documentation reduces misuse and helps you scale good practices.

4. Regular Review Cycle
AI tools evolve fast. Set quarterly or biannual check-ins to:

- Reevaluate tools you're using.
- Update policies as risk profiles change.
- Remove tools that aren't delivering value or that pose new risks.

How to Start This Week

To make AI work for you rather than overwhelm you, try these simple first steps:

- **Identify routine tasks** that take up the most time.
- **Test one AI tool** on one process for 30 days.
- **Track time saved** and errors reduced.
- **Build a short policy draft** with input from IT and HR.
- **Share guidance** with your team.

You don't need to adopt every AI trend — just the ones that clearly help your office run better.

AI and automation aren't replacements for the judgment, empathy, and coordination you bring to your role. They're extensions of your capacity—tools that, when used thoughtfully, make your work smoother and more strategic. ■

Using Employee Feedback from the Past Year to Improve Operations

Turning surveys and comments into real improvements

Over the past year, you've likely gathered a steady stream of employee feedback through surveys, one-on-one conversations, exit interviews, and informal comments shared in meetings or emails. Collecting feedback is only the first step. The real value comes from how that information is used to make meaningful improvements to daily operations. When employees see their input leading to real change, trust grows, engagement improves, and work flows more smoothly.

The most effective place to begin is by looking for patterns rather than focusing on individual comments. A single concern may reflect a personal preference, but repeated feedback about the same issue—unclear procedures, communication breakdowns, uneven workloads, or outdated systems—points to operational friction that deserves attention. The goal isn't to fix everything at once, but to identify where inefficiencies are creating unnecessary stress or slowing productivity.

Once key themes emerge, translate them into practical operational questions. If feedback suggests processes are inconsistent, that may

Using Employee Feedback from the Past Year to Improve Operations

signal gaps in documentation or uneven training. If burnout or workload concerns come up repeatedly, it's worth taking a closer look at staffing levels, task distribution, or unrealistic timelines. Employee feedback often highlights everyday obstacles that may not be obvious from a leadership perspective.

Focusing on quick wins can build momentum early. These are improvements that don't require major budget approvals but make an immediate impact, such as clarifying approval chains, updating outdated forms, reducing unnecessary meetings, or improving internal communication. Even small changes show employees that their voices matter and that action follows input.

More complex issues require transparency. Some feedback points to challenges that can't be resolved quickly due to budget constraints, compliance requirements, or organizational priorities. Acknowledging those concerns and clearly communicating what can be addressed now versus later helps maintain credibility. When people understand the reasoning behind decisions, they're far more likely to stay engaged and supportive.

Employee feedback is also a powerful tool for refining policies and procedures. If a policy is frequently misunderstood or ignored, the issue may be clarity rather than compliance. Use feedback to simplify language, eliminate unnecessary steps, and ensure procedures reflect how work actually gets done. Clear, practical policies reduce errors and frustration across the organization.

Sharing feedback themes with supervisors and leadership is another critical step. Many operational issues are tied to day-to-day management practices, not individual performance. Collaborative discussions help ensure expectations are aligned and improvements are reinforced consistently throughout the organization.

Closing the feedback loop is essential. Too often, employees provide thoughtful input and never hear about it again. Sharing what was learned and what actions are being taken—through staff meetings, internal updates, or brief emails—builds trust and encourages future participation. When employees see their feedback reflected in real changes, they're more likely to continue speaking up.

Finally, view employee feedback as an ongoing operational resource rather than a once-a-year exercise. Encouraging regular input and creating safe opportunities for honest communication makes it easier to address issues early, before they escalate. Over time, this approach shifts the workplace from reactive problem-solving to continuous improvement.

Using feedback effectively strengthens operations and reinforces a culture where people feel heard and valued. Turning last year's comments into tangible improvements sets the foundation for a more efficient, engaged, and resilient organization in the year ahead. ■