



# Managing Capacity. Driving Productivity.

How to leverage your firm's capacity  
to get more done.

In partnership with  **Thriveal**<sup>™</sup>

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## Introduction by Jason Blumer, CPA

You may have heard the famous Socrates quote, “To know thyself is the beginning of wisdom.” Easier said than done, Socrates! With any endeavor, we all need time to step back and know why we are doing what we are doing. And when it comes to running a growing firm, we can often get lost in the weeds of client work. But there’s no strategy and planning down in the weeds. Client work might produce our revenue, but it’s not our only work.

We must take the time to know our teams too. This is how we help our firms grow in healthy ways. Knowing our teams (and knowing ourselves as the owners) is how we manage the capacity we have for our work and the times when we have limitations.

As we tell our Thriveal community, “As a firm entrepreneur, you can’t do anything you want, but you can make any decision you want.” This acknowledges our limitations with time, mental capacity, and the need for rest. Like my partner says, “It’s all in the same bucket.” That’s why understanding our team’s capacity is crucial for scaling our firms.

An overarching theme in this guide is that capacity is indeed limited. So how do you scale an organization?

That’s what this guide seeks to answer.

You will learn new theories of people management, the definitions of capacity, the factors that influence capacity, how to be strategic with your time, and how to use capacity to your advantage.

So, I ask you four key questions:

1. Are you ready to build a highly valuable firm by focusing on your competitive capacity?
2. Are you ready to become a leader who plans?
3. Are you ready to see your firm become highly intentional?
4. Are you ready to sell highly valuable services that you have time to deliver?

Let’s do it.

**Jason Blumer, CPA**  
CEO, Blumer CPAs  
CEO, Thriveal CPA Network

## PART 1

# The Realities of Human Capacity

'Capacity' is an often misunderstood word in service-based firms. As an accounting firm owner, you sell services, so you need to understand that your (and your team's) capacity is all you have to make money. Think about capacity as your inventory.

This capacity is what you turn into revenue. That's why it's so important to get it right. Not having this deep understanding can result in:

1. Over-serving your clients and performing out-of-scope work.
2. Overburdening your team with so much work that they can't continue producing a high level of service.

Both of these outcomes hurt your firm because they compromise its ability to produce sustainable and profitable revenue that fuels your growth.

## The Definition of Capacity for Accounting Firms

To make the most of your firm's capacity, you need to understand what it means.

Capacity is a firm's ability to **exchange** the team's **limited** expertise and technical abilities for **future** revenue in ways that balance:

1. a manageable work responsibility (load) for the professional team member, and
2. an appropriate value for the client

There are three distinct parts to this definition:

### 1. Exchange (vs. imbalance)

- You have purchased the capacity from your team (via payroll), and they are exchanging that capacity with clients (in the form of revenue).
- As a result, you need to be clear about a team member's commitment to their capacity, particularly in relation to scope.

### 2. Limited (vs. abundant)

- You can't pretend that your team has an overly abundant volume of capacity—a team member's expertise and technical abilities are limited.
- It's important to take on revenue at the same pace as your team's capacity, keeping in mind that it can change depending on developing experience, increased productivity, enhanced efficiency via technology, and hiring.

### 3. Future (vs. now)

- Capacity as a resource only exists in the future, because once the capacity has passed into history, it's no longer manageable.
- Achieving a proper balance between capacity and client value is a future planning activity (more on this later).

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## The Role of Scope in Capacity Management

Scope is capacity's cousin. The capacity of your professional team is how you make your money, and scope is how you protect your capacity.

Scope is a contractual definition between you and your clients that allows you to sell your capacity in **sustainable** and **profitable** ways.

There are two key parts to this definition:

1. **Sustainable:** Managing capacity in a sustainable way allows you to sell your services effectively over your firm's long-term growth.
2. **Profitable:** You want to sell your team's capacity in exchange for the right amount of revenue. When you get this exchange right, your firm can become profitable.

Being able to objectively understand the definition of capacity is the first step in truly managing it successfully, competitively, and strategically. But that's only the beginning.

Capacity is an intimate concept in an accounting firm. Each person's capacity matters. It constitutes deeply human components, and as a result, is managed individually.

The MELT theory of human capacity breaks down these human components.

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### Using the MELT Theory to Understand the Human Components of Capacity

The human components of capacity can be a mix of a person's unique working habits, their ability to manage their time, their working locations, and specific personal events they are going through at any given time. Each of these impacts their output.

It's important to note that you can't simply 'fix' these areas—they are realities of life. But there are actions you (and they) can take to manage them.

These components can be categorized into four areas that make up the MELT theory. You'll notice that they're either 'Capacity Trappings' or 'Capacity Resources'. These outline how much control you have over them.

**Capacity Trappings** are fully controlled by a team member, are deeply personal, and are off-limits to you as their employer. **Capacity Resources** can be led by firm owners and are controllable through policies at your firm.

### Mind

#### Capacity Trapping

This relates to someone's ability to focus and manage distractions in the world around them. When they're juggling too many things at once, their mental capacity can't function optimally.

Some distractions are more easily managed than others. For example, a team member who is watching Netflix while working on tax returns can easily fix that distraction. It's a little more challenging for, say, a single parent whose child is home sick from daycare.

And not all distractions are external to work. If a team member constantly shifts from one task to a completely unrelated one, and back again, they're likely context-switching. Often mistaken for multitasking, context-switching can be damaging to productivity and thus, capacity.

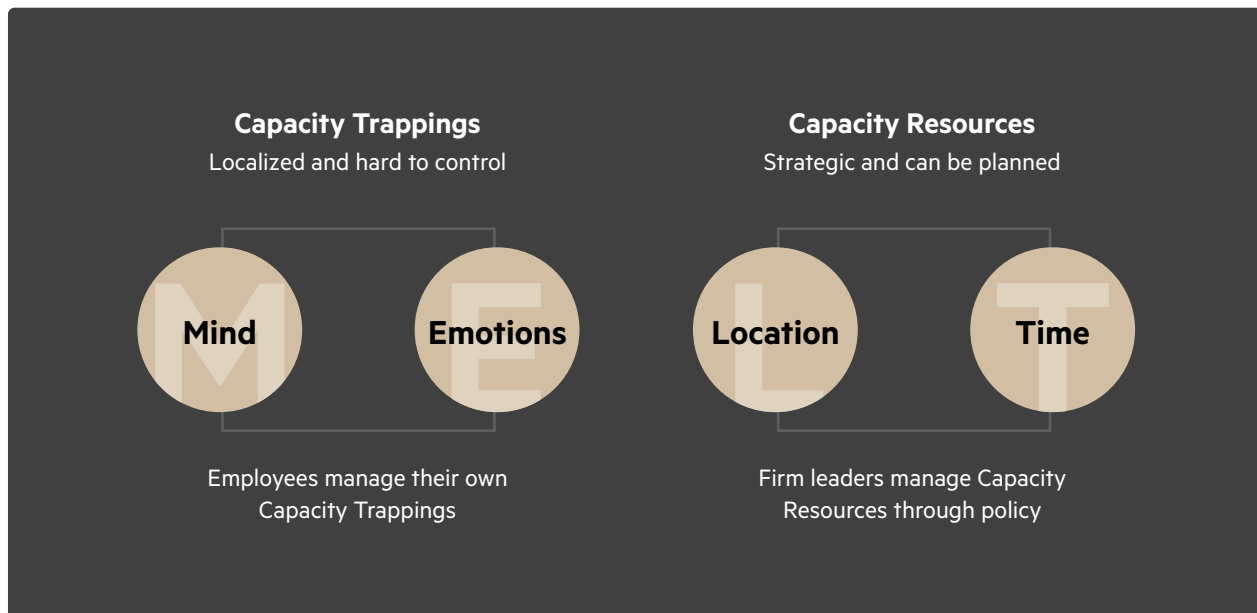


Fig. 1: The MELT theory of capacity management

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## Emotions

### Capacity Trapping

Someone's emotional state can seriously impact their capacity. It might be something deeply personal—death, mental health issues, divorce—or something more broad, like a pandemic.

But it's not necessarily just negative mental states. Positive yet stressful life events—like the birth of a child or moving houses—can similarly impact a person's capacity.

Overwhelmed team members isn't a new concept in the accounting industry. It's a taxing profession at the best of times. But understanding the unique relationship between an employee's mental state and their output will help you better manage capacity at your firm.

**“A lot of the time, we try to over-deliver to clients, and we want them to see us as superhumans when we are just humans.”**

Cameo Ashe CA, Lemonade Beach  
(via [Acuity Magazine](#))

## Location

### Capacity Resource

It might seem strange, especially after the effects the pandemic had on remote work, but as your firm's owner, you do have a say in where your team works. In-office, remote, or hybrid—that's your choice. You can weigh up the negatives and positives of each working model and decide what's best for your firm.

In terms of capacity, it can be difficult to decipher why a particular team member is struggling to consistently produce high quality work if they're working remotely. You might then decide to question what's happening in their lives, where they are working, and how they are managing the location of their work.

## Time

### Capacity Resource

This is what people traditionally equate to capacity. Yes, time does matter. Your calendar is the perfect reflection of what you can devote yourself to, whether personal or professional. So the foundation of your team's capacity is an agreement to exchange their hours for the pay you give them.

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Once you understand the human components of capacity, particularly from your team members' perspectives, you will begin to unlock the ability to get more out of them. Meet them where they are, acknowledge their challenges, work through them together, and witness your people transform into motivated and focused contributors.

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## Visualizing the Human Components of Capacity

All of these influential components on a person's capacity can be difficult to remember, especially when you have multiple team members. You can bring all this information together by visualizing what your team looks like, including where they're located, what their titles are, and how they're related to each other in your firm.

Many firms use an accountability chart for this. Slightly different from an organizational chart that depicts authority, an accountability chart depicts accountability, which is a precursor to proper capacity management. The accountability chart will help you understand your firm's capacity at a macro level.

While not everything can be visualized, like a person's mental state (Capacity Trappings), you'll at least have the Capacity Resources (location and time) clearly laid out. And at the end of the day, these are the ones you're able to influence.

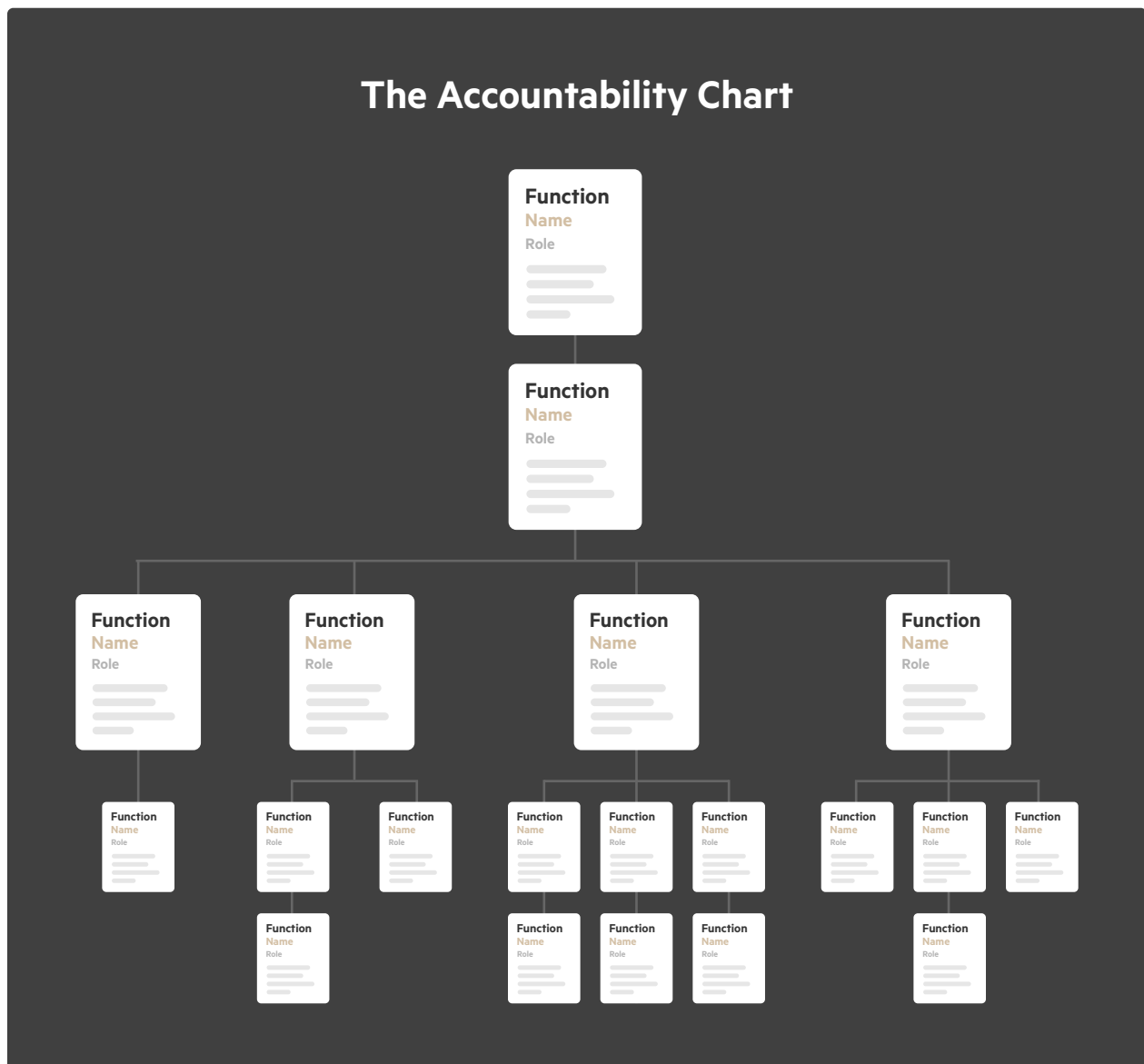


Fig. 2: Example of an accountability chart visualization, care of EOS



## PART 2

# The Power of Competitive Capacity Management

Your ability to manage your firm's capacity is crucial to its long-term success and growth. But actually executing it is less straightforward. There are many moving parts to consider, including the factors outlined in Part 1 that are out of your control.

But it's not impossible. Being intentional and strategic about planning will help you not only manage your firm's capacity, but also help your clients understand the value of your firm's time. When clients value your firm's time, they respect your pricing, communicate effectively, and truly partner with you in your relationship.

And it all starts with Strategic Calendar Work Blocking (SCWB)<sup>®</sup>.

## But First: Why is Capacity Management 'Competitive'?

Firms that intentionally manage their valuable capacity are firms that can scale more successfully. Protecting your capacity, being intentional with your planning, and developing processes around it will help you build a competitive firm. Not many firms focus on keeping their capacity this organized.

And because your firm is more competitive, it's more valuable. Valuable firms are hard to compete with. Maintaining this competitive capacity is ongoing work—you need to commit to it, and so does your team. It's part of how you'll unlock sustainable, long-term growth.

Now, onto Strategic Calendar Work Blocking (SCWB)<sup>®</sup>.

## Strategic Calendar Work Blocking (SCWB)<sup>®</sup>

Strategic Calendar Work Blocking (SCWB)<sup>®</sup> is a practical model for managing capacity. Unlike time tracking, which looks backward and bills for past services, SCWB<sup>®</sup> plans work in advance.

It's the opposite of time tracking. By blocking work on a calendar before completing it, you can better see your capacity, be more efficient, price services more effectively, and be more competitive.

Being intentional with your calendar blocking helps you control your schedule, rather than being at the mercy of emotions, tough days, team decisions, or poor planning.

**“Capacity management is crucial for long-term success and helps firms stay competitive by making informed decisions about resource allocation.”**

Ian Vacin, Karbon

## Capacity Management is Only for the Brave

Managing your firm's capacity and designing your entrepreneurial journey takes courage and skill. Chances are that you struggle with saying no to clients, colleagues, and peers. But capacity management helps you prioritize your time, teaching you when to say yes and when to say no according to your plan.

**“Concentration—that is, the courage to impose on time and events his or her own decision as to what really matters and comes first—is the executive’s only hope of becoming the master of time and events instead of their whipping boy.”**

Peter Drucker in *The Effective Executive*

In theory, this sounds good, but leveraging calendar work blocking to manage your future can be complicated. Whether you're an accounting firm owner, a professional athlete, or a popular YouTuber, blocking your calendar often conflicts with other people's demands on your time.

When you become super intentional about your future, people will question your decisions. They'll wonder why they can't reach you as easily, why they can't drop by your office, or why you can't leave early on Fridays whenever you feel like it. It takes courage to block your calendar, in part because it impacts those around you. Family members, colleagues, and your direct reports may ask, "Why are you so strict now?" It's because you are serious about achieving at a high level. High achievers are always planners.

Planners look ahead, decide what they will do in the future, and then reflect their intentions on a calendar that they stick to. Other people struggle with that type of intention, and it takes courage to stay the course.

## It All Starts in November: Implementing Strategic Calendar Work Blocking<sup>®</sup>

To be intentional about your capacity management next year, you need to start in November this year. Here is a tried and true process to help you block out your calendar for the whole year ahead:

### Competitive Capacity Management in Action

Implementing Strategic Calendar Work Blocking<sup>®</sup> to control your capacity for next year



#### Step 1. Brainstorm

Brainstorm the initiatives you want to tackle in the next calendar year. Get senior leaders involved.



#### Step 2. Categorize

Categorize into weekly, monthly, quarterly and annually recurring initiatives.



#### Step 3. Block

Block out 'container' times that you can use in the future. This is the key to becoming intentional with your time.



#### Step 4. Layer

Layer appointments on top of containers. Your team now knows your schedule, and you can delegate calendar management.

Fig. 3: Implementing Strategic Calendar Work Blocking<sup>®</sup> in four steps

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## Step 1 Brainstorm

Brainstorm every initiative you want to tackle in the next calendar year. Realistically, you won't get to do them all, but nothing is off-limits during this phase of planning. Make sure to get your senior leaders or partners involved.

## Step 3 Block

Add recurring appointments into your calendar. These aren't official appointments, but rather 'containers' for how you intend to use that particular time on your calendar. This is how you start to become intentional with your time. You can't predict the future, but what you can do is protect time for strategic initiatives. This is how you learn to prioritize, which is hugely important to your success as a firm leader.

## Step 2 Categorize

Now, categorize these strategic initiatives into weekly, monthly, quarterly, and annual recurring initiatives. You're looking for rhythms that can be put on a calendar and recur throughout the year.

## Step 4 Layer

As you progress through the year, you can begin layering in your appointments on top of those containers. For example, if on Mondays at 2-5pm you have a container called 'Client Meetings', you know that you've protected those three hours just for client meetings. And because you've used containers to illustrate how you want to use your time, you can now delegate your calendar management to another team member.

In the below example of SCWB®, the grey blocks are Jason Blumer's and the light brown blocks are his partner's. Many of these calendar bookings were actually placed a year in advance and set on a recurring schedule when they planned their time.

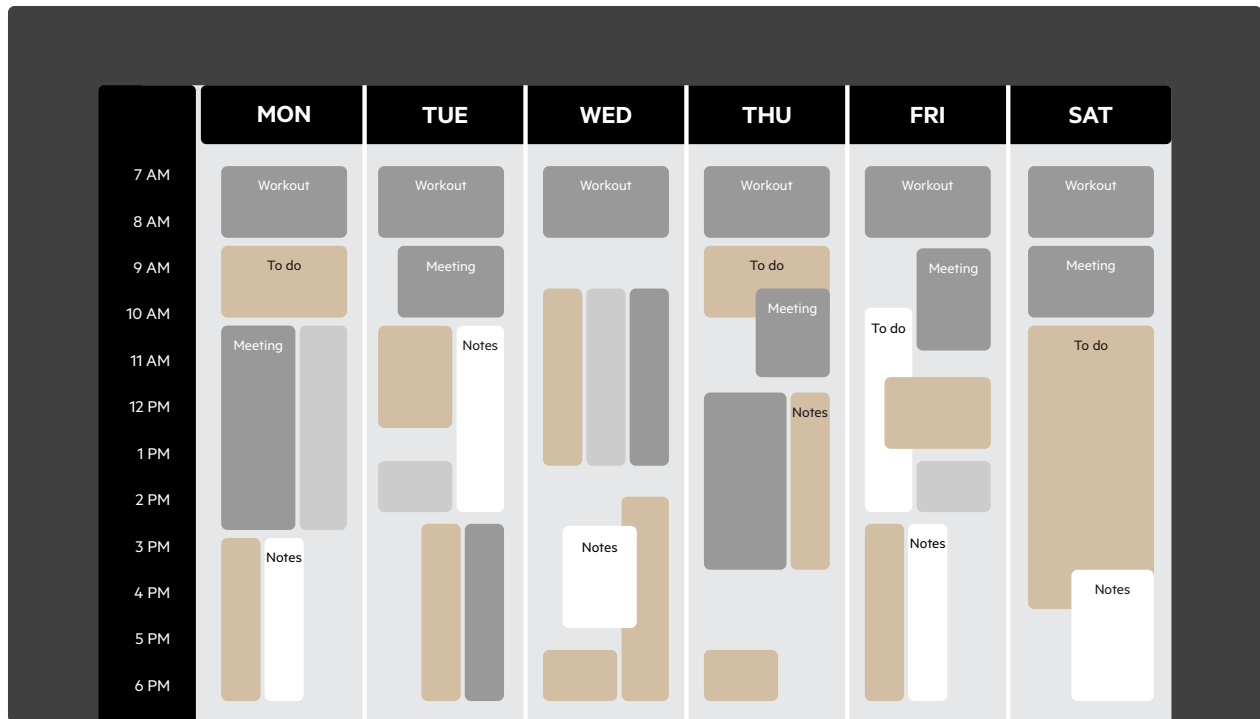


Fig. 4: Strategic Calendar Work Blocking® in action

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## PART 3

# The Capacity Exchange

To truly understand and leverage your firm's capacity, you need to understand how capacity fits within the context of your firm's operations.

Thriveal's Prototype Components Model for Growth™ (PCMG) explains the relationship between the market-facing side of your firm and the service-facing side. The market-facing side relates to the clients you serve, while the service-facing side focuses on the internal engine that runs your firm.



PCMG is a complex theoretical framework designed to help you grow your firm sustainably.

[Learn more in this deep-dive.](#)

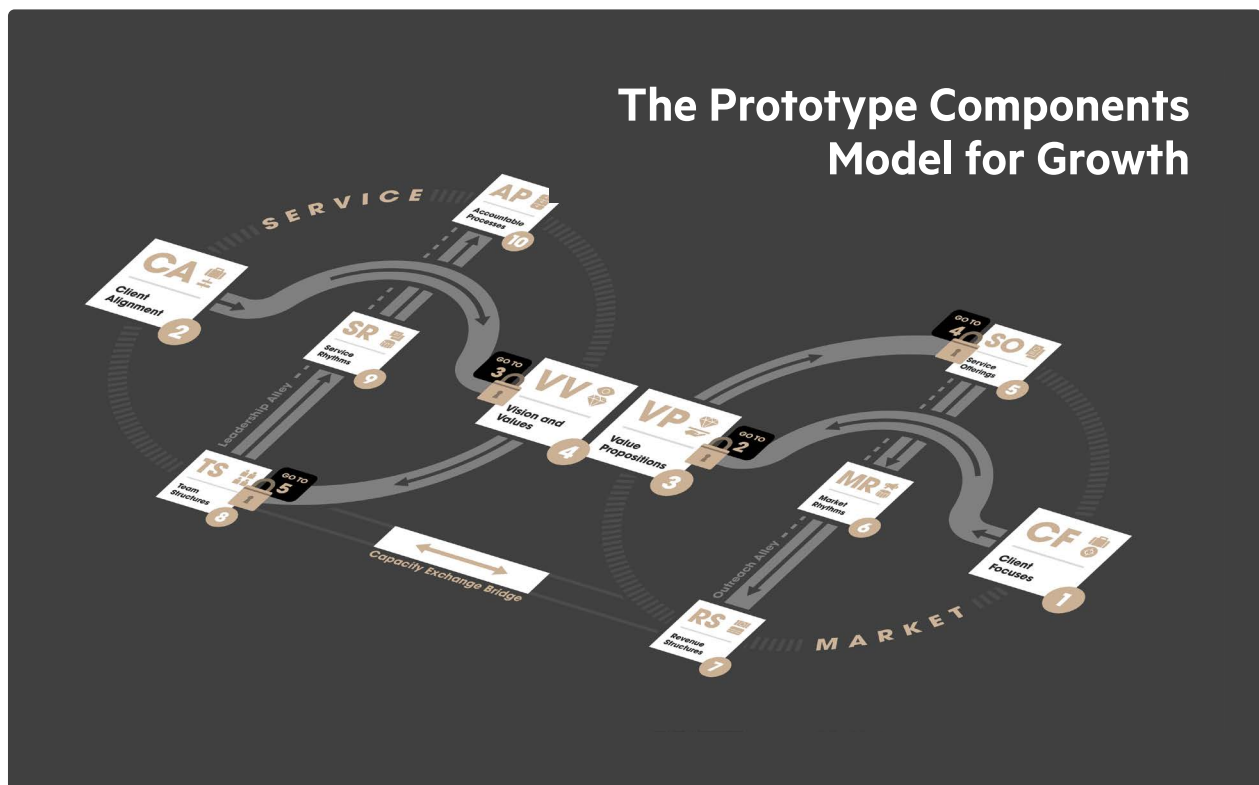


Fig. 5: The Prototype Components Model for Growth™

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The part of the model that connects each of these sides is called the 'Capacity Exchange Bridge' (fig. 5 on page 12). By following the arrows on the model, you'll see the market side (on the right) is where revenue comes into the firm (at component 7)—this is where the Capacity Exchange Bridge connects to the services side at component 8, which is where capacity is managed.

The Capacity Exchange Bridge is where a firm's leaders work to ensure the revenue coming from clients is being properly assigned to the team. This exchange between revenue and capacity needs to be efficient and profitable.

And that takes work. Adding more team members and more revenue affects the complexity of this exchange, but firm leaders who know their teams and are intentional about the types of clients and revenue they accept are better-equipped to manage it.

To help make the most out of this capacity exchange, it's important to understand the key players who will help make it possible, especially their perspectives and responsibilities.

## Capacity Perspective & Responsibilities for the Entrepreneur

	<b>Team</b> Keeper	<b>Firm</b> Balancer	<b>Clients</b> Consumer
<b>PERSPECTIVES</b>	"What must I give and keep in order to get paid?"	"What will we get from the team in exchange for (more) money?"	"What capacity and assignment do we have to make to receive our revenue?"
<b>RESPONSIBILITIES</b>	<ul style="list-style-type: none"><li>• Maintain consistent capacity output</li><li>• Work within scope</li><li>• Remain flexible and collaborative</li><li>• Abide by cultural core values</li></ul>	<ul style="list-style-type: none"><li>• Define team commitment responsibilities</li><li>• Maintain accountability around client scope</li><li>• Maintain accountability around team capacity</li><li>• Lead team in a safe and thoughtful culture</li></ul>	<ul style="list-style-type: none"><li>• Assume value and submit price</li><li>• Maintain responsibilities within agreement</li><li>• Remain flexible and collaborative</li><li>• Consume value from firm consistently</li></ul>

Fig. 6: Capacity perspectives and responsibilities

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## The Team

Your team members are wondering what they need to exchange in order to make more money.

### Responsibilities

#### Maintain consistent capacity output.

When team members are consistent in their work, they provide the leaders with dependable capacity output that they can rely on. This is how you, as the leader, can plan work appropriately.

#### Work within scope.

Healthy firms are those that work within scope. Not only do you need to be crystal clear with clients about what is considered in and out of scope, but you need to do the same with your team.

#### Remain flexible and collaborative.

Work doesn't always go to plan. Team members need to be agile and responsive to seasonal and situational ebbs and flows, ensuring the firm is able to scale and grow.

#### Abide by cultural core values.

Your firm's values are the core principles you've all agreed to follow. This is how the team remains strong and united.

## The Firm

This is your perspective as the firm's leader. You're trying to manage profitability, which includes balancing revenue with payroll.

### Responsibilities

#### Define team commitment and responsibilities.

Firm leaders need to be clear and aligned across all parts of the business—all the way from job descriptions to client work budgets. And you need to communicate clear expectations with your team. If not, you set them (and your firm) up for failure.

#### Maintain accountability around scope.

Rather than holding your team accountable, you've actually invited them into an accountable relationship when you hired them. Accountability is built into your relationship from the beginning. This is important to understand when you maintain this accountability in relation to managing scope.



See fig. 6 on page 13:

Capacity Perspective & Responsibilities for the Entrepreneur

#### Maintain accountability around team capacity.

Similar to accountability around scope, this relates to the agreement you have with your team members about their ability to remain consistent in their capacity output and their commitment to getting back on track when they fall behind.

#### Lead the team in a safe and thoughtful culture.

Distant leaders do not allow for a safe and thoughtful culture where the team (and clients) are honored and respected. Good things happen when everyone feels safe and valued.

## The Client

Your clients are trying to receive as much value as possible—which is produced by the team's capacity—for the amount of revenue they're paying.

### Responsibilities

#### Trust in the value being provided and pay accordingly.

Clients must lean into their relationship with you as their advisor. They need to trust your advice, judgment, and value—and pay for it as per your agreement.

#### Maintain responsibilities within agreement.

There are agreements within your client engagement contracts beyond the exchange of work and revenue. For example, clients have a responsibility to provide prompt, accurate documents and financial information, which will allow you to meet your responsibilities.

#### Remain flexible and collaborative.

Just like your team members, your clients need to be adaptable to the invariable ups and downs experienced within a firm. This is human work, and going through these challenges together is relationship-building.

#### Consume value from the firm consistently.

This might seem odd, but you can't serve clients well when they drop off their work and then check out. For example, if you sell them financial advisory meetings, they have to actually consume that value. It's your responsibility to make this responsibility clear.

## Implementing These Theories in Practice Across Your Firm

So far, this guide has explored key capacity management structures and methodologies to help you manage the challenging parts of growing your firm. Below are three common situations firms face, and how you can implement these theories in practice.

### 1. How to Manage Seasonal Peaks and Troughs in a Firm

As a firm leader, chances are that you often assume you need to accept every bit of revenue that comes to the firm. But that's not true. The choice to let a prospect become a client is up to the firm's leaders. You choose your clients—clients don't choose you.

Setting up processes like [client onboarding](#) will help you not only slow down the client intake of revenue, but also help you align your service more closely with your client. Client onboarding allows you to plan capacity to ensure your team remains balanced.



Set the tone for a successful client relationship with a consistent and efficient onboarding process. Download the [Client Onboarding template](#) from the Karbon Template Library to cover every step seamlessly.

Tax season—or [busy season](#)—is often the biggest culprit of seasonal pressure. One strategy is to simply cull the number of tax returns your team will complete in a season. Yes, your revenue may take a hit, but remember that your revenue must match your firm's capacity. If there is an imbalance on the Capacity Exchange Bridge (fig. 5), your team, firm, and clients will suffer.

You might also consider [letting go of your challenging clients](#) and potentially replacing them with your ideal clients (or not at all). This will do wonders for your capacity management.

### 2. Do You Need to Hire? Or is Your Team Unproductive?

All team members have varying levels of productivity depending on their experience, how long they've worked at your firm, etc. It's up to you to understand each of their situations, so you can best assess whether or not they're working productively. This is where the MELT theory of capacity management comes into play ([see page 6](#)).

Often, firm leaders think their team doesn't have capacity because team members report being overwhelmed. Naturally, they hire more team members. But that doesn't solve the problem—it feeds it.

In many situations, the cause of overwhelm isn't headcount. It's the firm's systems and processes. Team members are unproductive because processes aren't standardized or systems are inefficient. The key to understanding your team's productivity (or lack thereof) is visibility. You need to see why work is taking so long to complete and why team members are burnt out. Only then can you assess and implement fixes.

A good place to start is by getting your team to place their work on calendars (similar to time blocking). This will help you visualize how they're spending their time, helping you uncover gaps in productivity on a weekly basis. It then feeds back into your overall understanding of your firm's capacity management.

The tools you choose to power your firm can also help. For example, an [accounting practice management tool](#) with capacity management features will provide you with visibility across your firm, helping you drill in to see bottlenecks and workflow issues.

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### 3. How to Help Your Team to Accurately Predict and Prioritize Their Capacity

Remember that capacity management is a planning activity. You need to, as best as you can, predict and prioritize the future.

**“A 40-hour time-blocked work week, I estimate, produces the same amount of output as a 60+ hour work week pursued without structure.”**

Cal Newport in *Deep Work: Rules for Focused Success in a Distracted World*

Get your team members to place their work on their calendars for the upcoming week. This is their understanding of how they need to use their time. Take this opportunity to review this with them and verify if their predictions and prioritizations are accurate. If they've missed the mark, it's your responsibility to help them understand what an accurate view of their future capacity is.

## The Path Forward: Mastering Capacity

Everything outlined in this guide is more than a collection of theories, methodologies, and strategies—it's a mindset shift. Embrace it, and you'll see your firm thrive.

It won't be easy though. Many high-performing firms still stumble in this area. But they keep persisting in their pursuit to achieve the scalable growth they know is possible.

As a foundational principle, leaders who stay close to their team, provide them with clarity on what their role requires, and then help them each time they struggle will build a firm that produces high value in a consistent way. This is the recipe you need to become a major player in your market and demand prices that make your firm profitable.



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# Practice Management Built for Growth

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The screenshot displays the KARBON software interface. On the left is a navigation sidebar with categories like 'Get Started', 'Triage', 'My Week', 'Assignments', 'Work', 'Contacts', 'Intelligence', 'Insights', 'Time', 'Billing', 'RECENTLY VIEWED', and 'Log Out'. The main area is titled 'Capacity Dashboard' and shows a summary of work items: 26 items, 13,940.00 USD Budget, 82h 15m, 6,460.00 USD Actual, and 7,480.00 USD Remaining. Below this, work items are organized by team members: Sara Goepel, Yohan Seimon, Lachlan Macindoe, and Paz Zwanikken. Each item includes a progress bar, status (e.g., 'In Progress', 'Ready for Review'), due date, and budget/actual/remaining time and cost. A modal window is open over the 'Individual Tax Harriet London' item, showing its status as 'Waiting on Client' and due date as 'Today'.