

**THE NEW
TALENT
PLAYBOOK**
Podcast

Workbook

"No Crying Allowed": How One Firm Eliminated 80-Hour Weeks and Improved Client Satisfaction

Featuring Joe Romano

Episode 8 - Season 4

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You just listened to Joe Romano, founder of Romano & Associates, reveal how his firm maintains an exceptional culture, achieves less than 1% client attrition, and keeps employee burnout at bay, **even during the chaos of tax season.**

Joe's secret isn't about working harder; it's about working smarter by being deliberate with appreciation, flexibility, and strategic support. This playbook will guide you through his key principles so you can build a more resilient, efficient, and happier team.

1. Redefine Your "Return on Investment" (ROI)

Joe's primary ROI isn't just financial. It's measured in his team's well-being and client satisfaction. His goal: "that we don't have anybody crying" and keeping everyone sane. This **human-centric approach is the foundation** of his firm's success.

Your Firm's "Sanity" Scorecard:

On a scale of 1 (Low) to 5 (High), how would you rate your firm on these metrics?

Metric	Score (1-5)
Employee happiness and low stress levels.	
Client satisfaction and retention.	
Leadership's quality of life (less hair-pulling!).	
Team morale during the busiest seasons.	
Flexibility in work schedules.	

What is your lowest-scoring area? What is one small, deliberate action you can take this month to improve it by one point?

2. Delegate the "How," Not Just the "What"

Joe's breakthrough came when he delegated administrative tasks, freeing up his high-value tax professionals to focus exclusively on client work. This wasn't about offloading menial tasks; it was a strategic move to maximize his team's core strengths.

The Delegation Audit:

Identify tasks your senior team members are doing that don't align with their highest-value skills.

Team Member/Role	Low-Value Tasks They Currently Handle	Who Could Do This Instead?
<i>Example: Senior Accountant</i>	<i>Scheduling client calls, finalizing/sending returns.</i>	<i>Administrative Assistant / Offshore Talent</i>
Owner		
Senior Manager		
Area Professional		

3. Integrate, Don't Just Outsource

Joe Romano's offshore administrative team isn't a separate entity; they are a core part of the firm. He emphasizes, "We consider your people, our people." They are included in meetings, their input is valued, and they are essential to the firm's workflow and success.

The Integration Mind-Shift:

Think of one remote or offshore team member. *How can you shift their involvement from task-based to contribution-based this week?*

- From: "Please handle these emails."
 - To: "What patterns are you seeing in my inbox? How can we improve our response system?"
- From: "Schedule these client meetings."
 - To: "You're on the front lines with clients. What feedback are you hearing that could help the whole team?"

Now, apply this shift to your own team.

- Current Task You Assign:

- New Contribution-Focused Question You Can Ask:

4. Invest Deliberately in Your People

From monthly virtual happy hours to an all-expenses-paid trip to Mexico for employees and a guest, Joe invests heavily in showing appreciation. This acknowledges the support systems that enable his team to thrive.

Your Appreciation & Growth Plan:

What is your current plan for showing appreciation and fostering growth?

- Appreciation: How do you celebrate your team's hard work, especially after intense periods? (Go beyond just salary/bonuses).

- Recognition: Joe takes the team's plus-ones on the company trip to acknowledge their partners' support. How can you recognize the external support systems (family, partners) that help your employees succeed?

Brainstorm one high-impact appreciation gesture you can plan for after your next busy season.

5. Commit to Continuous Improvement

Joe emphasizes that his firm hasn't "figured it out yet" and is constantly seeking input from all 19 team members to improve. He invests over 40 hours per employee in Continuing Professional Education (CPE) annually because expertise and relevance are non-negotiable.

Your Continuous Improvement Audit:

How are you investing in your team's and firm's evolution?

- Training Budget: What is your annual budget per employee for upskilling, conferences, or certifications?

- Feedback Loop: When was the last time you held a dedicated meeting (like Joe's two-day session) to ask your entire team, "What can we do better?"

- Future-Proofing: What is one emerging trend (like AI in research, which Joe mentioned) that your team needs to get educated on this year?

*"Making everybody happy and keeping everybody sane. That's the big ROI." -
Joe Romano*

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