

## January Pre-Season Readiness Checklist - EROs



BANK AND IRS TASKS
☐ Verify that you have received and inventoried all check stock and smartcards from bank partners.
☐ Become familiar with the process for ordering marketing kits and additional check stock from your bank, if needed
SOFTWARE TASKS
☐ Ensure all fee and billing schedules have been updated accordingly.
OPERATIONS TASKS
☐ Test all systems to make sure office, computers, printers, Internet and network setups are complete.
Prepare tax preparer schedules for the month.
TRAINING TASKS
Run practice returns in the software to ensure fees match expected pricing.
Continue to have preparers run practice returns in the software.
MARKETING TASKS
Finalize your store marketing promotions.
Begin mail, call, or text message campaigns to prior-year customers.
☐ Purchase thank you cards for customers.
Contact local area businesses to distribute coupons for their employees.
☐ Create/revise your media contact list for upcoming press release submissions and community relations efforts.
Review and submit template press release.
Ensure you have an incentive program put in place for your preparers to sell Protection Plus.