CrossLink®
Professional Tax Software

February Readiness Checklist

Bank and IRS Tasks

- [ ] Evaluate check stock and pre-paid debit card inventory; order additional stock, if needed.

Software Tasks

- [ ] Evaluate all fee and billing schedules and update accordingly based on clientele and competition.
- [ ] Continue to familiarize yourself with all CrossLink software updates and releases as they become available.

Operations Tasks

- [ ] Monitor store volumes and adjust hours of operation and schedules accordingly.
- [ ] Create tax preparer work schedules for the month.
- [ ] Monitor all Federal and State rejects and ensure taxpayers are contacted promptly for quick resolution.

Training Tasks

- [ ] Plan to review all appropriate tax law changes, itemizations and Schedules with tax preparer staff after peak week to prepare for late-season client returns.

Marketing Tasks

- [ ] Make your storefront “loud” - use banners, balloons, or window paint in front of your store; place wind-feathers, yard signs, or sign shakers near the street to draw attention to your location.
- [ ] Continue your store marketing plans. Modify as necessary based on clientele and competitive environment.
- [ ] Execute a client referral campaign using the referral coupons in the CrossLink software.

    1. Open the finalized tax return and click on the “Print” dropdown menu at the top.
    2. Select “Referral Coupons”, and click “Print”.

- [ ] Consider a mail, call, or text campaign to customers whose returns are “on-hold”, offering a discount on tax preparation to get them back to complete the return.
- [ ] Continue mail, call, and text campaigns to prior year customers who visited in February and March of last year.
- [ ] Send thank you cards to returning customers who have completed their tax returns. Don’t forget to request a referral!

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