



January Pre-Season Readiness Checklist - Service Bureaus

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 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 local store marketing promotions for each location.
- 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](#).

