

FEBRUARY

READINESS CHECKLIST - EROS



BANK AND IRS TASK

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

SOFTWARE TASKS

- ☐ Assess all fee and billing schedules and, based on clientele and competition, update accordingly.
- ☐ 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 accordingly.
- ☐ Create tax preparer work schedules for the month.
- ☐ Monitor all Federal and State rejects to ensure taxpayers are contacted promptly for quick resolution.
- ☐ Consider tax preparer incentives and contests to generate friendly competition. Prizes could include a dollar amount bonus for each ancillary unit sold.

TRAINING TASKS

- ☐ Plan to review all appropriate tax law changes, with your tax preparer staff after peak week to prepare for late-season client returns.
- ☐ Watch e-mail and social media for CrossLink Tax Updates.

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.
- ☐ Assess your marketing plans and modify as necessary.
- ☐ Execute a client referral campaign using the referral coupons found 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!
- ☐ Ensure your preparers are educated on audit protection and other ancillary services and that they are offering them with every tax return.

CONTACT US TODAY TO LEARN MORE!

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SOCIAL

