

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 customers.
- ☐ As part of your call and messaging campaigns to customers, encourage them to set-up their [IRS Online Account](#) to gather all federally provided tax information needed to file their return.
- ☐ 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 audit protection and other third-party services to your taxpayer customers.

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