

FEBRUARY

READINESS CHECKLIST SERVICE BUREAUS

BANK AND IRS TASK

- Ensure sub-sites continue to evaluate check stock and prepaid debit card inventory; order additional stock, if needed.

SOFTWARE TASKS

- Assess all fee and billing schedules on a per-site basis and, based on clientele and competition, update accordingly.
- Continue to familiarize yourself with all CrossLink software updates and releases as they become available and communicate the changes to your sub-sites.

OPERATIONS TASKS

- Monitor all Federal and State rejects and ensure your sub-sites are promptly contacting clients for a quick resolution.
- Set daily return count goals for each of your sub-sites based on last year's performance.
- Use CrossLink reports to monitor progress, then communicate positive results / encouragement to EROs as often as possible.
- Consider tax preparer incentives and contests between sub-sites to generate friendly competition. Prizes could include a pizza party for the site with the most returns, or a dollar amount bonus for each ancillary unit sold.

TRAINING TASKS

- To prepare for late-season client returns, plan to review all appropriate tax law changes with your training lead or sub-sites and have them coordinate training with preparers after peak week.
- Watch e-mail and social media for CrossLink Tax Updates and communicate appropriate content to your sub-sites.

MARKETING TASKS

- Encourage your sub-sites to make their storefronts "loud!" Use banners, balloons, or window paint in front of their stores; place wind feathers, yard signs, or sign shakers near the street to draw attention to their locations.
- Have your sub-sites continue local store marketing plans and modify as necessary.
- Ensure your sub-sites are executing a taxpayer referral campaign using the referral coupons found in CrossLink's software.

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MARKETING TASKS - CONTINUED

- Encourage sub-sites to consider a mail, call, or text campaign to taxpayers whose returns are “on-hold”, offering a discount on tax prep to get them back to complete the return.
- Make sure your sub-sites continue mail, call, and text campaigns to prior year taxpayers who visited in February and March of last year.
- Encourage tax preparers at all sub-sites to send “thank you” cards to returning taxpayers who have completed their tax returns. Remind them to request a referral!
- Ensure your sub-offices are educated on all ancillary products and that all preparers are offering them with every tax return.

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