

JANUARY

PRE-SEASON READINESS CHECKLIST SERVICE BUREAUS

BANK AND IRS TASKS

- Verify that all sub-sites 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

- Have each sub-site test all systems to make sure office, computers, printers, Internet and network setups are complete.
- Have each sub-site prepare tax preparer schedules for the month.

TRAINING TASKS

- Run practice returns in the software to ensure fees match expected pricing.
- Ensure each sub-site continues 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 customers.
- As part of your sub-sites' call and messaging campaigns to customers, ensure your sub-sites are encouraging their customers to set-up their [IRS Online Account](#) to gather all federally provided tax information needed to file their return.
- Encourage each sub-site to purchase thank you cards for customers.
- Contact local area businesses around each sub-site 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 all of your sub-sites to sell audit protection and other third-party services to your taxpayer customers.

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