

# Score Your Tax Business

Take 30 seconds to evaluate your tax business' efficiency and profitability.

Circle each answer that best describes your current setup.

## Client Experience

- My clients still fill out paper forms or send documents manually
- I use some digital tools, but the process isn't fully streamlined
- My client experience is fast, digital, and easy from start to finish

## Data Entry & Efficiency

- I manually enter most client data into returns
- I use some automation, but still spend significant time keying data
- My client experience is fast, digital, and easy from start to finish

## Revenue Per Return

- I primarily earn from tax preparation fees only
- I occasionally offer additional services to increase revenue
- I consistently maximize every return with built-in revenue opportunities

## Payment Collection

- I collect payments separately or after the return is completed
- I have some digital payment options, but it's not seamless
- My payment process is fully integrated and frictionless for clients

Continue scoring on the next page >

## Business Automation

- Most of my processes are manual
- I've automated a few parts of my workflow
- My systems are connected and automated across my business

## Client Retention & Growth

- I rely on seasonal clients and referrals
- I make some effort to stay connected year-round
- I've built a system that drives repeat business and referrals consistently

### On Average Where Did You Score?



## Ready to Increase Your Score?

Connect with our team and take the next step toward a higher-performing business.

**Get Started  
Today!**

Scan

