CrossLink®
Professional Tax Software

February Readiness Checklist - Service Bureaus

BANK AND IRS TASKS

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

SOFTWARE TASKS

- ☐ Evaluate all fee and billing schedules on a per-site basis and update accordingly based on clientele and competition.
- ☐ 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 per tax preparer for each ancillary unit sold.

TRAINING TASKS

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

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. Have underperforming sites tweak plans as necessary based on clientele and competitive environment.

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MARKETING TASKS CONTINUED

- ☐ Ensure your sub-sites are executing a taxpayer referral campaign using the referral coupons in CrossLink's software.

    1. Open the finalized tax return and click on the "Print" dropdown menu at the top.
    2. Select "Referral Coupons", and click "Print".

- ☐ 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 not to forget 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.