



## 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 prior-year customers.
- 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 Protection Plus.

