



March Readiness Checklist - EROs

BANK AND IRS TASKS

- Be aware of bank product (i.e. RTs, RACs) application deadlines and be sure to communicate to your customers.

SOFTWARE TASKS

- Evaluate all fee and billing schedules and update accordingly based on clientele and competition.
- Familiarize yourself with all CrossLink software updates and releases as they become available.

OPERATIONS TASKS

- Monitor your store volume and adjust hours of operation and schedules accordingly.
- Create tax preparer schedules for the month.
- Monitor all State and Federal rejects and ensure customers are contacted promptly for quick resolution.

TRAINING TASKS

- Review all appropriate tax law changes, itemizations and Schedules with tax preparer staff to prepare for late season client returns.
- Continue to check CrossLink Social Media resources for industry news, support updates, software tips, and more.

MARKETING TASKS

- Continue local store marketing plans. Tweak as necessary based on clientele and competitive environment.
- Utilize CrossLink's **List of Non-Returning Clients** report, found in the **Utility** menu of the software, to identify your clients from last year that have not returned to have their taxes prepared this year. Watch a short video to learn how to access this valuable report at <https://youtu.be/bFYCJie5plU>.
- Send thank you cards to returning clients who have completed their tax returns and be sure to request a referral.
- Distribute coupons and/or career-specific deduction checklists to large employers in your area.
- Consider a community relations effort to generate traffic and free publicity - e.g. partner with a local food bank to host a food drive and offer \$5 off tax prep per can of food (up to a certain dollar amount). Distribute flyers to patrons of nearby grocery stores (be sure to get permission first!). Write a press release and use media contact list to promote the event.

