



## March Readiness Checklist - Service Bureaus

### BANK AND IRS TASKS

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

### 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 any changes to your sub-sites.

### OPERATIONS TASKS

- Monitor all State and Federal rejects and ensure your sub-sites are promptly contacting clients for a quick resolution.
- Continue to set daily return count goals for each of your sub-sites based on last year's performance.
- Designate a "tax expert" in your organization that can be contacted with questions about difficult returns.

### TRAINING TASKS

- After reviewing changes to appropriate tax laws, itemizations and Schedules with your training lead or sub-sites, make sure your training lead and sub-sites have put appropriate training plans into effect with all preparers for late-season client returns.
- Ensure all sub-sites are effectively communicating the benefits of all ancillary products to clients.
- Continue to check CrossLink Social Media resources for industry news, support updates, software tips, and more.

### MARKETING TASKS

- Have your sub-sites continue local store marketing plans. Have underperforming sites tweak plans as necessary based on clientele and competitive environment.
- Make sure your sub-sites know how to 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>.
- Encourage tax preparers at all sub-sites to write thank you cards to returning clients who have completed their tax returns. Remind them to request a referral!
- Encourage your sub-sites to distribute coupons and/or career-specific deduction checklists to large employers in your area to help drive traffic to their locations.
- Encourage your sub-sites to consider a community-relations effort to generate traffic and free publicity for their locations - 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).

