CrossLink
Professional Tax Solutions

MARCH

Readiness Checklist - EROs

BANK AND IRS TASK

- [ ] Be aware of bank product application deadlines and communicate them to your customers as needed.

SOFTWARE TASKS

- [ ] Assess all fee and billing schedules and, based on clientele and competition, update accordingly.
- [ ] Continue to familiarize yourself with all CrossLink software updates and releases as they become available.

OPERATIONS TASKS

- [ ] Monitor store volumes and adjust hours of operation accordingly.
- [ ] Create tax preparer work schedules for the month.
- [ ] Monitor all State and Federal rejects to ensure taxpayers are contacted promptly for quick resolution.

TRAINING TASKS

- [ ] Review all appropriate tax law changes with your tax preparer staff to prepare for late season client returns.
- [ ] Ensure all tax preparers are effectively communicating the benefits of audit protection and other ancillary services to clients.
- [ ] Continue to check for CrossLink email and social media resources for industry news, support updates, software tips, and more.

MARKETING TASKS

- [ ] Continue local store marketing plans and modify as necessary.
- [ ] 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
- [ ] Send "thank you" cards to returning clients who have completed their tax returns. Don't forget 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 your media contact list to promote the event.

CONTACT US TODAY TO LEARN MORE!

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SOCIAL