



MARCH

Readiness Checklist - Service Bureaus

BANK AND IRS TASK

- ☐ Be aware of bank product application deadlines and communicate them to your sub-sites.

SOFTWARE TASKS

- ☐ Assess all fee and billing schedules on a per-site basis and, based on clientele and competition, update accordingly.
- ☐ 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 to 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 all appropriate tax law changes with your training lead or sub-sites, ensure they 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 and services to clients.
- ☐ Continue to check for CrossLink email and social media resources for industry news, support updates, software tips, and more.

MARKETING TASKS

- ☐ Have your sub-sites continue local store marketing plans and modify as necessary.
- ☐ Ensure sub-sites are utilizing CrossLink's **List of Non-Returning Clients** report, found in the Utility menu of the software, to identify clients from last year that have not returned to have their taxes prepared this year. 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 tax preparers at all sub-sites to send "thank you" cards to returning clients who have completed their tax returns. Remind them to request a referral!
- ☐ Recommend to your sub-sites to distribute coupons and/or career-specific deduction checklists to large employers in their area to help drive traffic to their locations.
- ☐ Have your sub-sites 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). Sub-site employees can 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 events for each location.

CONTACT US TODAY TO LEARN MORE!

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SOCIAL

