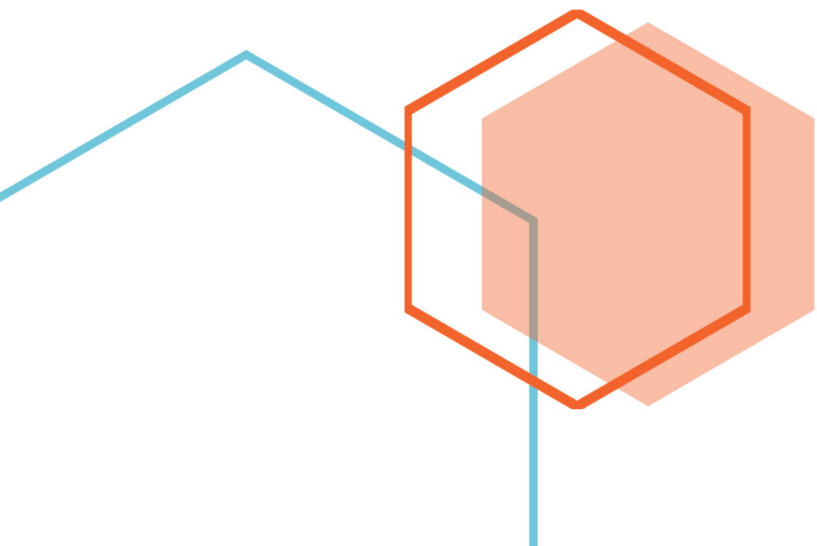




Pre-Season Checklist for Tax Season Success

Workbook

This workbook will provide participants with an epic pre-season checklist that will streamline workflows and processes to reduce the hassles of the tax season. This workbook includes practice management, marketing, content management, organizers, tax law updates, and more. Tax season doesn't have to consume your life. Get prepared and enjoy your success!





Pre-Season Checklist for Tax Season Success

Workbook

Worksheet 1 – Finding Your Why

Worksheet 2 – What Would You Like to be Different

Worksheet 3 – The Miracle Question

Worksheet 4 – SWOT Analysis

Worksheet 5 – The Checklist for Creating Checklists

“No matter how expert you may be, well-designed checklists can improve outcomes.”

~ Steven Levitt

Finding Your Why Worksheet

Key Concepts to Consider While Working On Finding Your Why:

- Fulfillment is a right not a privilege
- The goal is to take steps that will have a positive effect on everyone around us
- Finding your Why is a deeply personal journey
- Your Why is static and independent of time and space
- No matter your position, owner or employee, you can become the leader you wish you had
- It is helpful to go through this exercise with a partner

Beginning to find your Why

1. Gather your stories. This is your Origin story. Most of us our Why was formed by our teenage years. For an organization you would examine Why the company was founded? Or Why key members are proud to be a part of the organization?
 - a. _____
 - b. _____
 - c. _____
 - d. _____
 - e. _____
2. Identify Themes in your stories. For example, you're more than just the middle child, you're the glue that held your siblings together. Or instead of just the new hire, you were the one who came in the door and started the company on a new, fresh path.
 - a. _____
 - b. _____
 - c. _____
 - d. _____
 - e. _____
3. Draft your Why Statement. Should be simple, clear, actionable, focused on your effect on others, affirmative language. Tip: First blank is the contribution you make to the lives of others. The second blank represents the impact of your contribution.
 - a. To _____
So That _____

What would you like to be different next year?

Write down 1-5 things that you would like to change for this upcoming tax season....

SWOT Analysis Worksheet

Think about your responses to the Miracle Question. These are the things that will be different after you implement your checklists. What needs to be different to achieve the miracle? Let's examine the strengths, weaknesses, opportunities, and threats in your current environment. These are the elements that will provide you with the overview of your strengths and opportunities for you to flourish and the weaknesses and threats that can inspire improvement.

STRENGTHS What do you do well? What unique resources can you draw on? What do others see as your strengths?	WEAKNESSES What could you improve? Where do you have fewer resources than others? What are others likely to see as weaknesses?

OPPORTUNITIES What opportunities are open to you? What trends could you take advantage of? How can you turn your strengths into opportunities?	THREATS What threats could harm you? What is your competition doing? What threats do your weaknesses expose you to?

The checklist to get you to YOUR ultimate checklist for tax season success

Write a date next to each of these items. Put it on your calendar. 5-4-3-2-1 Go!

DATE

1. _____ Take the time to find your Why.
 - a. Find a partner to work with you.
 - b. Write it out.
 - c. Say it out loud so it becomes reality and actionable.
2. _____ List out each of your Whats.
 - a. _____ What products do you sell?
 - i. Each product has a different checklist and SOP.
 - b. _____ List out each of your marketing campaigns that coincide with your products.
 - i. How is this created?
 - ii. How is it distributed?
 - iii. How often?
 - c. _____ List your CE goals for the year.
 - i. Create the checklist to achieve them
 - d. _____ Formalize the process for opening your office for tax season.
 - i. How/When do you purchase the update to your software?
 - ii. How/When do you contact your clients?
 - iii. What kind of training do you need?
 - iv. Did you order folders?
 - v. Etc.
 - e. _____ What self-care is important to you?
 - i. Schedule your vacation time
 - ii. Schedule your breaktime everyday
 - iii. Schedule your exercise time
 - iv. Schedule your hobbies, family time, etc.
3. _____ For each item in #2 perform a SWOT analysis. This way you won't need to spend time on parts of the process that are going well and you'll know what tools you already have that are working or tools that you need to replace.
 - a. _____ Do you need new tools?
 - i. Create a checklist for analyzing tools.
 - b. _____ Do you need to hire or fire to achieve your goals?
 - i. There's a checklist and supporting resources for this.
4. _____ With your Why in mind targeted on your What, determine each step that needs to happen to get to the What, the result. This is your Operations Manual. Anyone should be able to sit down in any chair in your organization and repeat the process. That's how detailed the checklist is.
 - a. Use the Ed Mendlowitz presentation included in your resources.
 - b. Use templates pre-built in your tech stack

- c. Add to your existing process to ensure consistency and leverage your strengths
- 5. _____ Schedule your regular cadence of reviewing checklists and processes. Go through the steps of this presentation on a regular basis.
 - a. What would you like to go differently?
 - b. Ask yourself the Miracle Question. What would be different if the issue was fixed overnight?
 - c. What is the SWOT analysis for fixing the issue?
 - d. Go through the steps of this checklist to arrive at your new and improved checklist
- 6. Store your Operations Manual where your team can access it.
- 7. Automate the process when possible. Schedule the time each week/month/quarter to improve your system.