How to Tune Up Your Practice Prior to Tax Season

When is the last time you truly took stock of your workflow for tax season? The fall is a good time to review your current processes and tools before the season starts again. Use this checklist to help ensure you aren't skipping any necessary steps.

- [ ] **Step 1: Rate your performance last season**
  Grade your firm's performance last season, and ask your staff to do the same. This will help you identify the parts of your process that could be more efficient for the upcoming tax season.

- [ ] **Step 2: Evaluate your tax software**
  Evaluate your current tax software to ensure it's meeting your budget, client and growth requirements. If it's not, test alternative software on your complicated returns from last tax season.

- [ ] **Step 3: Prepare to manage your digital data**
  Consider how you will save and store your digital files, and where and how often the files will be backed up. Ensure you have an intuitive file structure. It's also a good time to archive old files.

- [ ] **Step 4: Review your engagement letter**
  Update your engagement letter, and consider working with an attorney to ensure you're covered for the services you provide and it's updated to include any new policies or procedures.

- [ ] **Step 5: Update your tax organizer**
  At a minimum, ensure questions pertaining to any tax law changes and due diligence requirements are included. Also, decide if you would like to move from a printed, mailed organizer to a digital one such as Intuit® Link.

- [ ] **Step 6: Review your pricing**
  Determine if it's time for a price increase for your services, or perhaps to a different pricing model altogether, such as bundled or value pricing. If you decide to make a change, give your clients a heads-up that it's coming.

- [ ] **Step 7: Make a plan for tax information collection**
  Consider using secure client portal this year. If you introduce a new tool to your clients, create detailed instructions on how to use the new portal system.

- [ ] **Step 8: Gather feedback from your clients**
  Send existing clients a brief survey to see how satisfied they are, and review any comments your clients share to help improve your practice.

- [ ] **Step 9: Make a plan for tax information collection**
  Consider using secure client portal this year. If you introduce a new tool to your clients, create detailed instructions on how to use the new portal system.

- [ ] **Step 10: Take time for yourself**
  Don't forget to take some time to relax before the tax season craziness starts all over again.