

5 steps for a GREAT TAX SEASON

HERE ARE 5 STEPS YOU CAN TAKE TO MAKE SURE YOU HAVE YOUR BEST TAX SEASON.



1. PICK THE RIGHT SOFTWARE

Are you using the same software this year just because you've used it in the past? Maybe it's time for a change! There are tons of software options available with brand new technology that can boost productivity and increase your performance. This year, make a promise to research the different options available, so you can be confident you've made right decision for you and your clients.

2. USE THE RIGHT BANK PRODUCT

All bank products are unique! Each bank has different programs that may be more beneficial for your specific clients. Call around and chat with each bank to ensure you understand the details of their programs so you can pick the right one. It's a simple step but can make the difference between keeping or losing a client.



3. MARKET, MARKET, MARKET!

Carve out some time and learn how to effectively market your business. Whether it's on social media, Google, or an email campaign, create a budget and make it happen! Marketing is the lifeblood of a growing business. Word of mouth is a great start, but creating new marketing initiatives will give your business the jump start it needs to grow!

4. HIRE & TRAIN YOUR SUPPORT STAFF

We are in a seasonal business, so it can be challenging to keep a full team busy throughout the year. Utilize the slow months and start your training early! Being proactive will give you a solid team that will be ready to jump in once tax season kicks off, allowing you the time you need to keep your business thriving.



5. SETUP A SUPPORT NETWORK

It takes a village to run a successful business. Find a group of like minded people to connect with. This could be with local preparers in your area, a Facebook group, or a service bureau. We all know the feeling when a customer asks a question we don't have the answer to. Use your support system and ask for guidance! You want to have the right people to lean on when you are stuck on a "taxing" issue.

Sigma Tax Pro provides custom professional tax software solutions to help you **grow your business and achieve your goals!**

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