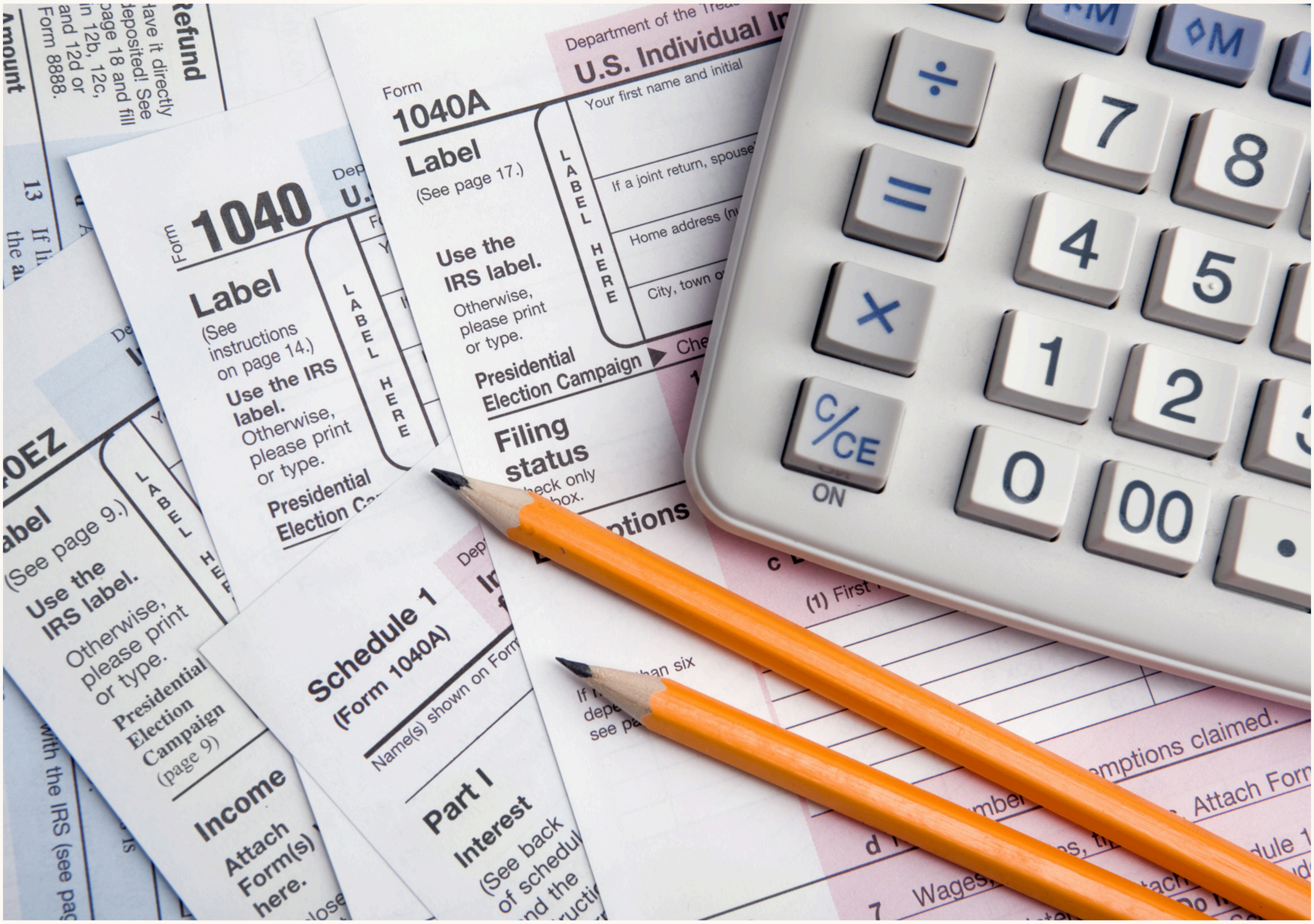
THE **FuturePROOF** ACCOUNTANT

TAXDOME YEAR-END

PLANNING WORKBOOK

Planning for a seamless busy season



INTRODUCTION

Hey accountants! Ready to head into year-end with clarity instead of chaos? This TaxDome Year-End Planning Workbook is designed to help you streamline your systems, tighten up your workflows, and head into busy season with confidence.

Think of it as your annual system reset. A simple, repeatable process to help you work smarter, reduce bottlenecks, and keep your client experience running smoothly—even during peak season.

Let's dive in and prime your practice for the new year! Be sure to revisit this guide each year.

Annual Tune-up

Clean up your workspace and prepare TaxDome for a fresh year.

- Ensure all documents are saved to the correct folders
- Archive completed jobs and resolve or close out open jobs
- Review open or unassigned tasks and take action as needed
- Clear/archive *Inbox +* and assign all outstanding items
- Archive inactive or former client accounts
- Confirm pipeline recurrences exclude former clients
- Review firm settings & user notification preferences

Templates, Automations & Workflow Updates

Refresh your firm's reusable assets to reflect the new year.

- Update organizers for tax-year changes (e.g. updated questions, dates)
- Update engagement letters (terms, pricing, signers, etc.)
- Update job templates (updated due dates, internal deadlines, time budget, etc.)
- Update templates to reflect staffing changes (e.g. adjust task assignees, role-based assignments, and the "from" sender on email/chat templates)
- Update all other templates as needed (emails, chats, invoices, etc.)
- Add new tax-year folders to your Folder Template & bulk apply
- Add or edit custom fields as needed
- Add or adjust tags as needed for new tax year or new services
- Add any new services to your TaxDome Services list
- Incorporate new TaxDome features (i.e. Packages, Job Statuses, Client-facing statuses, client document checklist, intake dates, tax return delivery, etc.)

New Year Kick-off Prep

Set up your practice and clients for a smooth start to busy season.

- Update client info, tags, and custom fields
- Update client document checklists if using
- Review and update SOPs/Wikis with any workflow changes
- Invite any remaining clients to join the client portal
- Send new clients onboarding instructions for how to use the portal
- Encourage offline clients to go digital (e-signatures, uploads, messaging)
- Add jobs to pipeline recurrence with the correct start dates and job owners
- Draft your tax season kickoff email to send the first week of January
- Review pricing for services & draft communication for price increases
- Prepare for January deadlines (e.g. 1099 filings) and identify steps you can streamline now
- Review recurring invoices and extend/update as needed

Team Readiness & Capacity

Ensure your team is fully equipped and aligned for busy season.

- Review licenses for new team members; remove access for departed staff
- Update team access based on role changes or client workload adjustments
- Train staff on updated workflows, new TaxDome features, and internal processes
- Educate team members on monitoring their workload and managing tasks
- Train team on using the client portal for team/client communication, messaging, and document management
- Review staffing capacity and assign responsibilities for peak-period workflows

PUTTING THIS INTO PRACTICE

It's great to have a checklist, but how do you actually implement it? Take this checklist and put it into a plan. Whether you use tasks in TaxDome, a project tool like ClickUp, a google sheet, or a to do list.... take these and put some dates to them. Create a plan to get it done, and a timeline to make it work.

Creating the plan and monitoring it, and then making it happen is the key to success and you are so ready to take this on. But if you feel like you need some help or guidance? Join us inside the FutureProof Accountant Membership. And as a little gift for joining this training, you can save 30% off the lifetime of your monthly membership using code: WORKSHOP30. Join here.

Ashley & Katie