

TAXTYME

3-DAY TAX BUSINESS LAUNCH WORKBOOK

From Tax Knowledge to Tax Business Infrastructure

Participant Name: _____

Business Name: _____

Email: _____

Phone: _____

Masterclass Date: _____

BUILD • LAUNCH • SCALE

WELCOME TO THE 3-DAY MASTERCLASS

This workbook is designed to help you move from an idea—or an existing tax-preparation skill set—into a structured tax business. Over three days, you will build the foundation, map your operations, and create a launch and growth plan.

Your 3-Day Roadmap

Day	Focus	Outcome
DAY 1	BUILD THE FOUNDATION	Business model, ERO readiness, compliance map, offers and pricing
DAY 2	BUILD THE MACHINE	Client workflow, software, bank products, team, SOPs and marketing
DAY 3	LAUNCH & SCALE	90-day launch plan, sales pipeline, KPIs, revenue goals and Inner Circle roadmap

Masterclass Commitment

- ☐ I will complete the exercises, not just watch the training.
- ☐ I will identify what I need to research or verify before operating.
- ☐ I will build systems that can be repeated by a team.
- ☐ I will leave with a written 90-day execution plan.

What do you want this tax business to create for you over the next 12 months?

DAY 1

BUILD THE FOUNDATION

Day 1 Outcomes

- ☐ Define your tax-business model and ideal client.
- ☐ Assess PTIN/EFIN and business readiness.
- ☐ Map your compliance infrastructure.
- ☐ Build your core service menu and pricing framework.
- ☐ Set your first-season return and revenue targets.

1. Your Tax Business Vision

Why are you launching or growing a tax business?

Who do you want to serve?

Ideal Client	Primary Need	How We Help

2. Choose Your Business Model

- ☐ Solo tax preparer
- ☐ ERO / tax office owner
- ☐ Virtual tax office
- ☐ Brick-and-mortar office

- ☐ Multi-preparer office
- ☐ Multi-location office
- ☐ Future service bureau
- ☐ Tax education / coaching add-on

My primary business model will be:

3. ERO Readiness Check

Requirement / System	Status	Next Action
Business entity / structure	☐ Ready ☐ Pending ☐ N/A	_____
EIN	☐ Ready ☐ Pending	_____
PTIN	☐ Active ☐ Renew ☐ Need	_____
EFIN / e-file provider application	☐ Active ☐ Pending ☐ Need	_____
Business bank account	☐ Ready ☐ Need	_____
Professional tax software	☐ Selected ☐ Comparing ☐ Need	_____
Written information security plan	☐ Ready ☐ Need	_____
Client intake process	☐ Ready ☐ Need	_____
Due diligence process	☐ Ready ☐ Need	_____
Document retention process	☐ Ready ☐ Need	_____

Compliance note: Use this workbook as a planning tool. Verify current federal, state, software, bank-product, privacy, security, and professional requirements that apply to your business before implementation.

4. Compliance Gap Analysis

What are the three biggest compliance or operational gaps I need to close?

Who or what resource will I use to verify each requirement?

5. Build Your Service Menu

Service	Will Offer?	Starting Price / Pricing Method	Notes
Individual tax return	☐	\$ _____ / _____	_____
Schedule C / self-employed	☐	\$ _____ / _____	_____
Amended return	☐	\$ _____ / _____	_____
Prior-year return	☐	\$ _____ / _____	_____
Business return	☐	\$ _____ / _____	_____
Tax planning	☐	\$ _____ / _____	_____
Audit / notice support	☐	\$ _____ / _____	_____
Other: _____	☐	\$ _____ / _____	_____

What will make your tax office different from the office down the street or online?

6. Revenue Target Worksheet

Metric	Goal
Target number of returns	_____
Average preparation fee	\$ _____
Projected preparation revenue	\$ _____
Other projected revenue	\$ _____
Projected gross revenue	\$ _____
Monthly operating expense target	\$ _____
Season profit goal	\$ _____

Formula: Target Returns × Average Preparation Fee = Projected Preparation Revenue.

What must be true for you to hit this target?

DAY 1 ACTION PLAN

Priority	Action	Owner	Deadline
1	_____	_____	_____

2	_____ ____	_____	_____
3	_____ ____	_____	_____
4	_____ ____	_____	_____
5	_____ ____	_____	_____

My biggest Day 1 takeaway:

DAY 2

BUILD THE MACHINE

Day 2 Outcomes

- ☐ Map the client journey from lead to completed return.
- ☐ Choose your technology stack.
- ☐ Understand where bank products fit into the workflow.
- ☐ Build your SOP and team structure.
- ☐ Create your first marketing and lead-generation system.

1. Client Journey Map

Stage	What Happens	System / Tool	Owner
Lead	_____	_____	_____
Appointment / Intake	_____	_____	_____
Document Collection	_____	_____	_____
Preparation	_____	_____	_____
Quality Review	_____	_____	_____
Signature / Payment	_____	_____	_____
E-file	_____	_____	_____
Funding / Completion	_____	_____	_____
Retention / Referral	_____	_____	_____

2. Technology Stack

Category	Current / Planned Tool	Status
Tax software	_____	☐ Ready ☐ Need
CRM	_____	☐ Ready ☐ Need
Client portal	_____	☐ Ready ☐ Need
E-signature	_____	☐ Ready ☐ Need
Payments	_____	☐ Ready ☐ Need
Email/SMS	_____	☐ Ready ☐ Need
Scheduling	_____	☐ Ready ☐ Need
Bookkeeping	_____	☐ Ready ☐ Need
File storage/security	_____	☐ Ready ☐ Need

3. Bank Product Planning

Use this section to compare available programs. Product availability, eligibility, fees, funding, advance terms, and approval are determined by the applicable provider or financial institution.

Question	Your Answer
Do you plan to offer refund-transfer products?	☐ Yes ☐ No ☐ Research
Do you plan to offer advance products where available?	☐ Yes ☐ No ☐ Research
Estimated clients using bank products	_____
Provider(s) to compare	_____
Enrollment deadline / next action	_____

What questions must I ask before selecting a bank-product provider?

4. SOP Builder

SOP Needed	Exists?	Who Builds It?	Due
Lead follow-up	☐	_____	_____
Client intake	☐	_____	_____
Document collection	☐	_____	_____
Return preparation	☐	_____	_____
Quality review	☐	_____	_____
Due diligence	☐	_____	_____
Payment / fee collection	☐	_____	_____
E-file / rejection handling	☐	_____	_____
Client communication	☐	_____	_____
Data security / incident response	☐	_____	_____

5. Team Structure

Role	Need Now?	Responsibilities	Compensation / Budget
ERO / Owner	☐	_____	_____
Tax Preparer	☐	_____	_____
Reviewer	☐	_____	_____
Intake Specialist	☐	_____	_____
Admin / VA	☐	_____	_____
Marketing	☐	_____	_____

What can you delegate so the owner is not doing everything?

6. Marketing Engine

My core marketing message:

Channel	Weekly Activity	Lead Goal
Facebook / Instagram	_____	_____
Email	_____	_____
SMS	_____	_____
Referral partners	_____	_____

Community / events	_____	_____
Paid ads	_____	_____

Write your first call-to-action:

DAY 2 ACTION PLAN

Priority	Action	Owner	Deadline
1	_____ _____	_____	_____
2	_____ _____	_____	_____
3	_____ _____	_____	_____
4	_____ _____	_____	_____
5	_____ _____	_____	_____

My biggest Day 2 takeaway:

DAY 3

LAUNCH & SCALE

Day 3 Outcomes

- ☐ Create your 90-day launch calendar.
- ☐ Build your sales pipeline and follow-up rhythm.
- ☐ Set measurable KPIs.
- ☐ Plan your launch offer and webinar conversion path.
- ☐ Identify your next level: Builder, Inner Circle, Elite, or VIP.

1. 90-Day Launch Roadmap

Phase	Focus	Top Actions
Days 1–30: BUILD	Foundation + compliance	1. _____ 2. _____ 3. _____
Days 31–60: LAUNCH	Marketing + leads	1. _____ 2. _____ 3. _____
Days 61–90: SCALE	Production + optimization	1. _____ 2. _____ 3. _____

2. Sales Pipeline

Pipeline Stage	Definition	Follow-Up Action
New Lead	_____	_____
Contacted	_____	_____
Qualified	_____	_____
Appointment / Consultation	_____	_____
Client / Customer	_____	_____
Nurture	_____	_____
Referral / Repeat	_____	_____

3. KPI Scorecard

KPI	Weekly Goal	Actual
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New leads	_____	_____
Consultations / appointments	_____	_____
New tax clients	_____	_____
Conversion rate	_____ %	_____ %
Returns started	_____	_____
Returns submitted	_____	_____
Returns accepted	_____	_____
Returns funded / completed	_____	_____
Average preparation fee	\$ _____	\$ _____
Gross revenue	\$ _____	\$ _____
Referrals generated	_____	_____

4. Launch Offer Builder

What is the primary offer you are launching?

Who is it for?

What problem does it solve?

What is included?

What is the price or pricing method?

What is the call-to-action?

5. Webinar / Masterclass Conversion Map

Stage	Offer / Action
Registration	
Pre-event nurture	
Live training	
Core offer	
Order bump / add-on	
Upsell	
Inner Circle / continuity	
VIP / high-ticket path	

6. Your ERO Growth Level

- ☐ ERO STARTER — I need foundation and compliance infrastructure.
- ☐ ERO BUILDER — I have the basics and need repeatable systems.
- ☐ ERO INNER CIRCLE — I want training, resources, AI, community and implementation support.
- ☐ ERO ELITE — I need coaching, team growth and scaling support.
- ☐ ERO VIP — I want private strategy and done-with-you implementation.

My next-level commitment is:

7. 30-Day Execution Calendar

Week	Primary Objective	Key Deliverable	Deadline
Week 1			
Week 2			
Week 3			
Week 4			

DAY 3 ACTION PLAN

Priority	Action	Owner	Deadline
1			
2			
3			
4			
5			

My biggest Day 3 takeaway:

BONUS TOOLS

TaxTyme Tax Business Launch

Tax Office Launch Checklist

- ☐ Business structure selected and verified
- ☐ EIN obtained
- ☐ PTIN active for paid preparers as applicable
- ☐ EFIN / e-file provider status addressed
- ☐ Business bank account established
- ☐ Tax software selected
- ☐ Bank-product options researched
- ☐ Client intake created
- ☐ Due diligence process documented
- ☐ Security/privacy processes documented
- ☐ Document retention process documented
- ☐ Pricing established
- ☐ Payment process established
- ☐ CRM/client tracking established
- ☐ Website/landing page ready
- ☐ Email/SMS follow-up ready
- ☐ Marketing calendar created
- ☐ Referral program created
- ☐ Team roles documented
- ☐ SOPs created
- ☐ Quality review process created
- ☐ 90-day goals entered into calendar

Tax Season Weekly CEO Review

Question	Notes
How many leads came in?	
How many became clients?	
How many returns were started/submitted/accepted?	
What is our average fee?	
What is our current revenue?	
Which preparer/team member needs support?	
What bottleneck slowed us down?	
What compliance issue needs attention?	
What marketing channel produced the best result?	
What are the top 3 priorities for next week?	

My Tax Business Launch Declaration

I am leaving this 3-Day Tax Business Launch Masterclass with a written plan. My responsibility is to execute, verify the requirements that apply to my business, measure my numbers, protect my clients, and build repeatable systems.

My 90-day revenue goal:

My 90-day client / return goal:

The three systems I will implement first:

The first action I will complete within 24 hours:

Participant Signature: _____ Date: _____

TAXTYME 3-DAY TAX BUSINESS LAUNCH WORKBOOK

Build the foundation. Launch with systems. Scale with intention.