

The Analytix Tax Season

Readiness Checklist

A complete, phase-by-phase benchmark your firm can use to prepare for next season.

This checklist is organized by when each step needs to happen, not just what the step is, because timing is most of what separates a steady tax season from a repeat of tax season burnout. Save it, print it, or share it with your leadership team. It is built to be used as a running benchmark.

Phase 1: Fall Planning, 3 to 4 Months Before Season Opens

Capacity and Staffing

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Pull last season's return volume by client type and compare it with this year's expected client count.

This is the baseline every other capacity decision depends on.

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Map expected return volume against confirmed staff capacity, month by month, not just across the season as a whole.

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Identify which weeks are likely to carry the heaviest review workload based on last year's patterns.

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Decide and document whether this season requires seasonal hires, outsourced support, or both.

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If using outsourced tax preparation, verify the provider's data security controls and review process before the season begins.

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Set a target maximum for weekly hours by role and obtain partner approval.

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Confirm backup coverage for every senior reviewer so no individual becomes a single point of failure.

Phase 2: Early Season Setup (Before January)

Intake and Workflow

- ☐ Send engagement letters and client organizers in December, not late January.
- ☐ Publish a firm client document deadline with clear expectations and consequences for late submissions.
- ☐ Create a reminder sequence for clients who have not submitted documents by the season's halfway point.
- ☐ Publish the firm's review calendar, including scheduled review checkpoints in February and March.
- ☐ Ensure every preparer and reviewer understands their workload capacity and knows who to notify if work exceeds that limit.
- ☐ Set up or confirm the technology used for document collection and first pass data entry.
- ☐ Walk through the escalation process for returns that fall behind schedule before the busy season begins.

Phase 3: Mid-Season Checkpoints (February and March)

Monitoring and Adjustment

- ☐ Conduct the first review checkpoint in February and identify returns that are falling behind schedule.
- ☐ Track weekly hours for every team member against the workload limits established in Phase 1.
Catching a pattern in week six is far less costly than discovering it in week fourteen.

- ☐ Conduct the second review checkpoint in March and redistribute overflow work before it reaches senior reviewers.
- ☐ Check in directly with staff carrying the heaviest workloads, not just the numbers on a dashboard.
- ☐ Confirm outsourced or seasonal support is focused on the repetitive work it was hired to handle.
- ☐ Flag any client relationship showing early signs of becoming a late or difficult filing.

Phase 4: Final Stretch (Last 2 to 4 Weeks Before the Deadline)

Protecting the Team Under Pressure

- ☐ Pause onboarding of new clients unless a partner explicitly approves an exception.
- ☐ Confirm the extension process and communicate it to clients early rather than waiting until the deadline approaches.
- ☐ A complete, phase-by-phase benchmark your firm can use to prepare for next season.
- ☐ Watch for signs of fatigue among senior staff and proactively redistribute work to reduce burnout risk.
- ☐ Confirm after hours coverage and identify who has final sign off authority if a partner is unavailable.

Phase 5: Post-Season Review (Within 30 Days of the Filing

Learning Before It Fades

- ☐ Hold a structured post season debrief while the details are still fresh.
- ☐ Record when client documents actually arrived compared with the requested submission deadlines.
- ☐ Document which weeks experienced the heaviest review workload and identify the reasons.
- ☐ Check in with employees who experienced the greatest workload strain, particularly anyone who may be considering leaving.
- ☐ Review accounting firm turnover risk with leadership instead of waiting for resignations to occur.
- ☐ Update workload limits, the review calendar, and staffing plans based on what actually happened during the season.
- ☐ Decide while the experience is still fresh which process improvements or outside support will be needed for next tax season.

How to Use This Checklist

Work through the checklist phase by phase instead of trying to complete everything at once. Firms that fully complete Phase 1 and Phase 2 are already ahead of many firms before filing season begins.

Revisit Phase 5 every year. It is the stage that turns each tax season into a learning opportunity and makes the next season easier, more efficient, and more sustainable.