



“We Don’t Just Do Taxes...WE KNOW TAXES”

TAX RETURN DAILY GOAL SHEET

Week Ending: Saturday, April 19, 2025

Location: Canton

**BASED ON THIS TIME LAST YEAR...
Our GOAL for the WEEK is to PREPARE**

Monday	11
Tuesday	0
Wednesday	0
Thursday	0
Friday	0
Saturday	0
Weekly Total	11

THE GOALS ABOVE CAN BE REACHED IF I, AS A TEAM MEMBER...

- 1) GREET EVERY CLIENT AND POTENTIAL CLIENT WITH, “WELCOME TO TCL”
- 2) BE PROFESSIONAL TO EVERY CLIENT AND POTENTIAL CLIENT ON THE PHONE AND IN PERSON
- 3) OFFER EVERY CLIENT AND POTENTIAL CLIENT REFRESHMENTS (coffee, juice, snacks, water, etc.)
- 4) GIVE MY BUSINESS CARD TO EVERY CLIENT AND POTENTIAL CLIENT
- 5) GIVE TCL GIFTS TO EVERY CLIENT AND POTENTIAL CLIENT (calendar, pen, etc.)
- 6) THANK EVERY CLIENT AND POTENTIAL CLIENT FOR COMING TO SEE US
- 7) DEMONSTRATE OUR SLOGAN TO THE FULLEST TO EVERY CLIENT AND POTENTIAL CLIENT,
“We Don’t Just Do Taxes...WE KNOW TAXES”