



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

## **TAX RETURN DAILY GOAL SHEET**

**Week Ending: Saturday, April 19, 2025**

**Location: Byram**

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

<b>Monday</b>	<b>17</b>
<b>Tuesday</b>	<b>4</b>
<b>Wednesday</b>	<b>0</b>
<b>Thursday</b>	<b>0</b>
<b>Friday</b>	<b>0</b>
<b>Saturday</b>	<b>0</b>
<b>Weekly Total</b>	<b>21</b>

**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,  
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