

Being effective at reaching clients for appointments

- 1 – Select your office
- 2 – Set a date range for clients who came in last year about this time to start their return
- 3 – Set the end date for about a month out
- 4 – Select clients that don't already have an appointment
- 5- Start with the RA Prequalified group and call them first (you can remove this filter when you have reached them all)
6. Hit apply filters to reduce your list and start making effective calls

The screenshot shows the 'START CONVERSION' interface for Jackson Hewitt Tax Service. The user is logged in as SHARA ABRAMS (NHQ). The interface includes filters for PCTR (EES), Office (10194), and Employee (All Employees). The main section is titled 'START CONVERSION' and has tabs for 'APPOINTMENTS', 'PRIOR YEAR CLIENTS', and 'LAPSED CLIENTS'. The 'PRIOR YEAR CLIENTS' tab is active. Below the tabs are various filter options: Segment Status (View Segments), View by Start Date range (12/01/2021 to 01/15/2022), View by PY Filing Date range, Select Filter(s) (including 'Does Not Have an Appointment' and 'RA Prequalified'), Filter by Disposition (All), Filter by Tenure (All), Resolution Status (No, Yes, Both), and SMS Opt-out (No, Yes, Both). At the bottom, there is a table of client records with columns for Client Name, Tenure, Start Date, PY Filing Date, Last Contact, Last Attempt, Last Disposition, Callback, Resolved?, and Actions. The 'Apply Filters' button is highlighted with a red arrow and a circled '6'. Other numbered callouts (1-5) point to the Office dropdown, the date range inputs, the 'Does Not Have an Appointment' checkbox, the 'RA Prequalified' checkbox, and the 'Apply Filters' button respectively.

Client Name	Tenure	Start Date	PY Filing Date	Last Contact	Last Attempt	Last Disposition	Callback	Resolved?	Actions
GREGG, MICHAEL GREGG, AMANDA	1 Year	04/19/2022	05/31/2022	-	-	-	-	No	See Details
WILLIAMS, AIDEN	1 Year	04/09/2022	05/03/2022	-	-	-	-	No	See Details
BRUMMITTE JR, ED BRUMMITTE, MELISSA	12 Years	04/22/2022	04/27/2022	04/08/2022 257	-	-	-	No	See Details
VANOVER, LORENE VANOVER JR, CLAYTON	12 Years	04/18/2022	04/18/2022	04/24/2021 606	-	-	-	No	See Details