

Ratings Metrics: How to rate potential clients

5 Star	4 Star	3 Star	2 Star	1 Star
•Has worked in the tax industry 5 or more years	•Has worked in the tax industry 2 or more years	•Has worked in the industry 2 years or less before under someone else but going on there own or for themselves	•Brand new to the industry	•Brand new to the tax industry
•Has worked with service buruea and other tax software companies before	•Has worked with service buruea and other tax software companies before	•has prepared taxes professionally but limited	•Has done their own taxes, friends and family but never professionally	•Knows nothing at all and has to learn from scratch.
•knowledgeable about other professional tax softwares (drake, tax wise, etc)	•knowledgeable about other professional tax software	•has used professional tax software but limited professional tax software Experience	•no professional tax software experience (only turbo tax)	•no professional tax software experience (only turbo tax)
Knowledgeable about bank products	Knowledgeable about bank products	•some knowledge of bank products or have used them before	•no knowledge of bank products or don't use them	•No knowledge of bank products or don't use them
•100 or more clients	•50 or more clients	•Has limited clientele(10-50 clients)	•Has no clientele	•Has no clientele
•May or may not have other business or side hustles (Credit repair, insurance, mlm, etc)	•May or may not have other business or side hustles (Credit repair, insurance, mlm, etc)	•May or may not have a side business in another industry (credit repair, insurance, mlm, etc)	•never ran a business before or side hustle in anyway	•Never ran a business in anyway(no side hustle such as sell insurance, credit repair, etc)
•May or may not have an efin. Has PTIN	•May or may not have an efin. Has PTIN	•May or may not have an efin. Has PTIN	•no Efin /no ptin	•no efin/no ptin