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Renewal readiness checklist

Get every client renewed and signed by the end of January, with one or two focused days of work instead of a two-month scramble.



This checklist follows the renewal calendar CPA and firm owner Logan Graf uses to renew about 130 clients each year with Ignition. Work through it month by month, starting right after the October 15 extension deadline. If you're starting late, skip to the last section for the one thing to fix first.

October: Review last year and decide what changes

Once the extension deadline passes, look back before you build anything new. Decide now so November is for finishing, not rethinking.

- [ ] List every service you delivered last year, and flag anything you did that wasn't in a package.
- [ ] Note which clients added complexity this year (new rentals, new entities, extra bank accounts). Those are your repricing candidates.
- [ ] Check package adoption. If nearly everyone picked the same tier, your pricing or tiers may need adjusting.
- [ ] Compare next year's service list with your team's capacity. Don't sell more than you can deliver in busy season.
- [ ] Decide on one thing: a full package rework, small tweaks, or just a price increase. Most years, small tweaks are enough.
- [ ] Pick a standard price increase for clients whose scope isn't changing (for example, 5–8%).
- [ ] Block one or two days in November to do the actual build.

November: Lock in packages, scope, terms, and pricing

This is where renewals become repeatable. The aim is one set of templates that covers about 80% of clients, with only the price changing per client.

Packages

- [ ] Finalize separate package templates for personal and business clients.
- [ ] Use a three-tier structure with a premium top tier as a price anchor so the middle tier feels like the obvious choice.
- [ ] Write a plain-language scope of work for every service and add-on.
- [ ] Record a short video walking through each package and attach it to the proposal.

Scope and out-of-scope

- [ ] List specific examples of work that will be billed extra (new rental properties, added entities, consulting questions outside the package).
- [ ] Add an "additional / out-of-scope work" service line so extra billing has a clear home.
- [ ] State that a change in complexity during the year is grounds to adjust next year's price.

Engagement letter and terms

- [ ] Compare your engagement letter with your E&O insurer's latest template and update only what changed.
- [ ] Keep legal terms standard. Customize conduct and termination clauses, not the legal language.
- [ ] Confirm your billing method (upfront, on completion, or recurring) and that you collect payment details at signing.

Pricing

- [ ] Apply the standard increase to unchanged clients.
- [ ] Reprice clients you flagged in October for added complexity.
- [ ] Decide how to handle friends-and-family exceptions, and keep that list short.

December: Build and send renewals in bulk

Send proposals as early in December as you can. The earlier they go out, the more clients sign before tax season starts.

- [ ] Pull up all engagements coming up for renewal and select them in one batch, not one by one.
- [ ] Bulk-renew with your standard price increase applied and rounded to the nearest dollar.
- [ ] Review the drafts before sending. Adjust the clients with scope changes and add any new services.
- [ ] Add a "What's new" section to the first page of the proposal covering changes to packages, billing, team, or pricing.
- [ ] If billing timing is changing (for example, moving from billing on completion to billing upfront), send a separate heads-up email too.

- [ ] Choose an email template that explains why the client is getting this proposal.
- [ ] Set automatic reminders. A good default is three reminders about three days apart.
- [ ] Set an expiry date: a short one for new prospects (around 7 days) and a longer one for returning clients.
- [ ] Give clients a reason to sign early, such as first-come booking for their prep slot or locked-in pricing.

January: Follow up and get everyone signed

Aim to have every renewal signed by January 31. Late signers mean one-off admin in the middle of busy season, when you can least afford it.

- [ ] Check who hasn't opened or signed the proposal. For couples, make sure it went to the spouse who actually reads email.
- [ ] Personally contact anyone still unsigned after the automatic reminders.
- [ ] Resend expired proposals in one batch, not as they trickle in.
- [ ] Decide what happens if someone hasn't signed by the cutoff (for example, they go on extension automatically) and tell them in advance.
- [ ] Make sure signed engagements trigger your onboarding steps automatically: document requests, booking links, and task creation in your practice management tool.
- [ ] Accept that some clients will always be late. If you communicated clearly, that's their choice to make.
- [ ] Write down what slowed things down this year so next October starts with a list.

Short on time? Fix scope first

If you only have a couple of weeks, make your scope and terms clear before you do anything else. Repetitive admin costs you time. Unclear scope costs you money and leads to awkward conversations all year.

"The emotional pain of having unclear scope and terms, and being afraid to bill a client extra ... you have nothing to point to." — Logan Graf, CPA

When a client asks for something their package doesn't include, clear scope lets you point to what they signed up for and quote an extra fee without an argument.

- [ ] Write one plain-language scope description per package.
- [ ] Add three to five concrete examples of what triggers an extra charge.
- [ ] Start from a ready-made Ignition package template instead of building from scratch.

Renewal season is coming up. Get a demo now and have your templates ready before December.

Watch now