

Building A High Performance Team

Homework Worksheet - Multiple Choice

Choose the best answer for each question.

1. What should an ERO build before building a team?

- A. Systems and procedures
- B. A larger office only
- C. A refund advance program
- D. A new logo

2. Which is a sign an ERO may be ready to recruit?

- A. No documented procedures
- B. Consistent lead flow and increasing workload
- C. No return review process
- D. No communication system

3. Which quality is important when recruiting a preparer?

- A. Coachability
- B. Poor communication
- C. Unwillingness to learn
- D. Lack of integrity

4. What is the module's view of character versus experience?

- A. Experience is always more important
- B. Character is often more valuable than experience
- C. Only tax knowledge matters
- D. Neither matters

5. Which is a useful interview question?

- A. Can you maintain confidentiality?
- B. Do you want unrestricted EFIN access?
- C. Would you skip office procedures?
- D. Do you expect no training?

6. Which is an interview red flag?

- A. Reliability
- B. Professional communication
- C. Unwillingness to follow procedures
- D. Coachability

7. Which item belongs on a new hire onboarding checklist?

- A. PTIN verification
- B. Software setup
- C. Compliance training
- D. All of the above

8. Which topic should be covered during onboarding?

- A. Client confidentiality
- B. Due diligence
- C. Return review procedures
- D. All of the above

9. How should training be treated?

- A. As a one-time event
- B. As an ongoing process
- C. As optional after hiring
- D. As unnecessary for experienced staff

10. Which is a training method listed in the module?

- A. Practice returns
- B. Case studies
- C. Weekly meetings
- D. All of the above

11. In a 50/50 split, how is revenue divided?

- A. Preparer 50%, office 50%
- B. Preparer 60%, office 40%
- C. Preparer 70%, office 30%
- D. Preparer 30%, office 70%

12. Which compensation factor should be considered?

- A. Who generates the lead
- B. Who pays software costs
- C. Who handles compliance and reviews
- D. All of the above

13. What should an ERO avoid when managing EFIN access?

- A. Separate user accounts
- B. Quality reviews
- C. Unrestricted preparer access
- D. Error tracking

14. Which best practice helps protect the EFIN?

- A. Review every return
- B. Use shared logins
- C. Skip production monitoring
- D. Ignore documented issues

15. Why does quality control matter?

- A. It helps identify errors, missing documents, and compliance concerns
- B. It slows down the office for no reason
- C. It replaces training
- D. It is only for new preparers

16. Which is a way to build team culture?

- A. Recognition programs and open communication
- B. Avoiding meetings
- C. Ignoring performance
- D. Removing training opportunities

17. What does a Compliance Lead do?

- A. Monitors return quality and documentation
- B. Handles only social media
- C. Replaces the ERO
- D. Controls client bank accounts

18. Which is a metric an ERO should track?

- A. Returns prepared
- B. Average fee
- C. Error rates
- D. All of the above

19. Why should team performance be reviewed regularly?

- A. To celebrate wins and address concerns early
- B. To eliminate accountability
- C. To avoid using data
- D. To stop team development

20. What is the key rule when scaling a team?

- A. Grow as fast as possible
- B. Do not grow faster than your systems can support
- C. Eliminate leadership layers
- D. Give all preparers unrestricted access

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Homework Answer Key

1. **A** - Systems and procedures
2. **B** - Consistent lead flow and increasing workload
3. **A** - Coachability
4. **B** - Character is often more valuable than experience
5. **A** - Can you maintain confidentiality?
6. **C** - Unwillingness to follow procedures
7. **D** - All of the above
8. **D** - All of the above
9. **B** - As an ongoing process
10. **D** - All of the above
11. **A** - Preparer 50%, office 50%
12. **D** - All of the above
13. **C** - Unrestricted preparer access
14. **A** - Review every return
15. **A** - It helps identify errors, missing documents, and compliance concerns
16. **A** - Recognition programs and open communication
17. **A** - Monitors return quality and documentation
18. **D** - All of the above
19. **A** - To celebrate wins and address concerns early
20. **B** - Do not grow faster than your systems can support