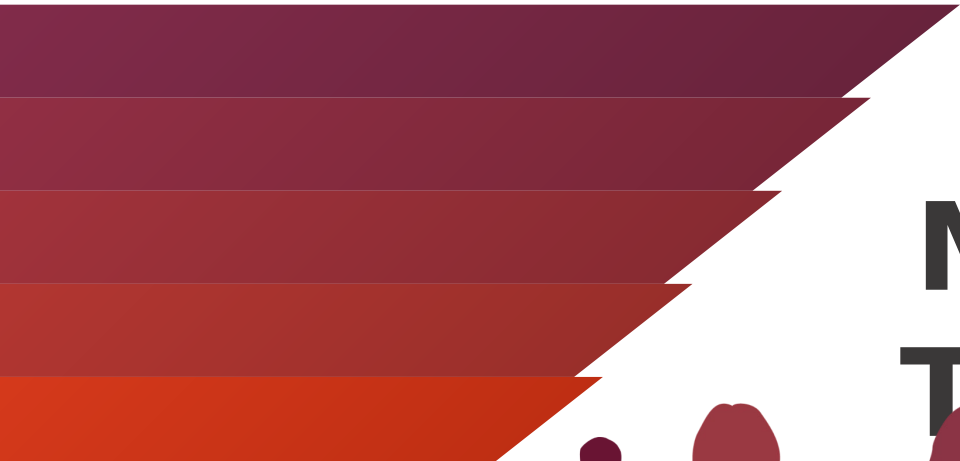
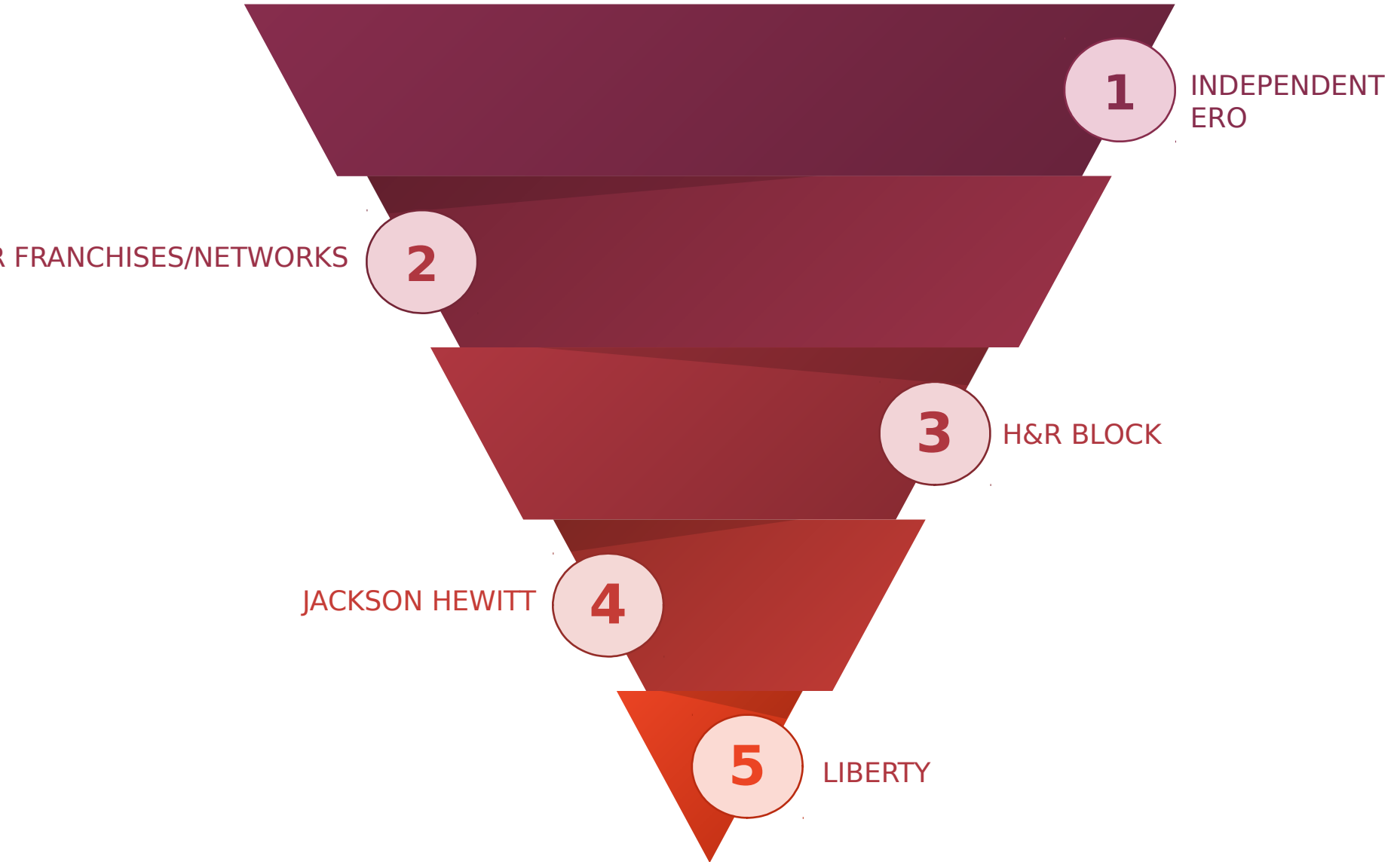




MARKETING A TAX BUSINESS



COMPETITIVE LANDSCAPE





Competitor's Strength

Market Share
Brand Recognition
Large Advertising Budget
Locations

Weakness

Broad Marketing Strategy
Lack Flexibility

Thing to take into consideration when setting up your tax business marketing plan

- Hiring Qualified Staff to implement program
- Up to date with Current Tax Laws
- Using a Professional Tax Software
- Marketing-Marketing-Marketing

Step 1

- Hire a professional graphic designer
- Develop Color Scheme
- Create Logo
- Create Fliers
- Marketing Materials Consistent with brand



Step 2

Create a short motto for your tax preparation business emphasizing on

- Professionalism
- Accuracy
- Highest Refund
- Fast Service



Step 3

Hire a flyer team distribution team

- Team of 5 or more
- Make pieces trackable
- Pay per Commission



Steps in Creating a Marketing Plan

Have a solid online presence:

- Website
- Facebook
- Twitter
- LinkedIn
- Craigslist



Step 5

Design special discount programs

- For New Client Acquisitions
- To retain current customers
 - Must be long term focus



Step 6

Prepare your tax preparers with customer service training

- Tax Preparation
- Customer Service Training
- Sales Technique
- Interview Techniques
- Post Sales Techniques



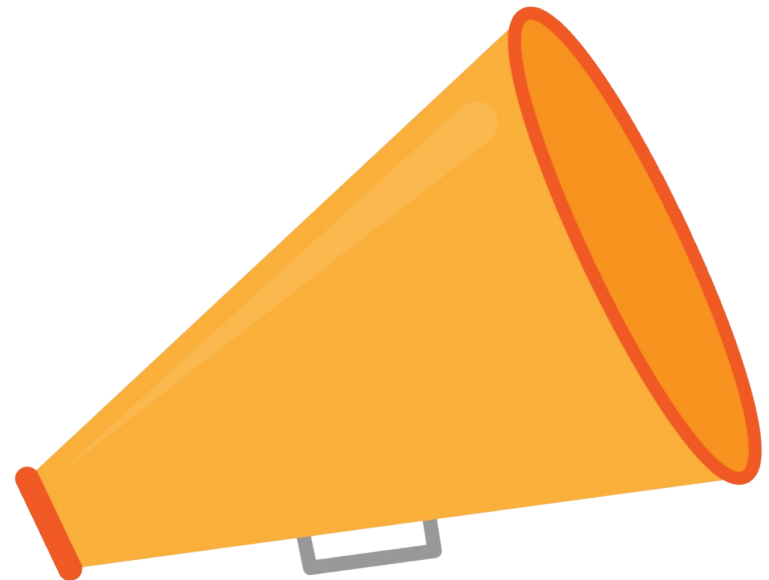
Communication Techniques

Messaging by Audience

- Target Parents who trade dependents to friends and family members
- Target the unemployed and self employed
- Target customers who works fulltime and are price conscious

Targeted Consumer Demographics

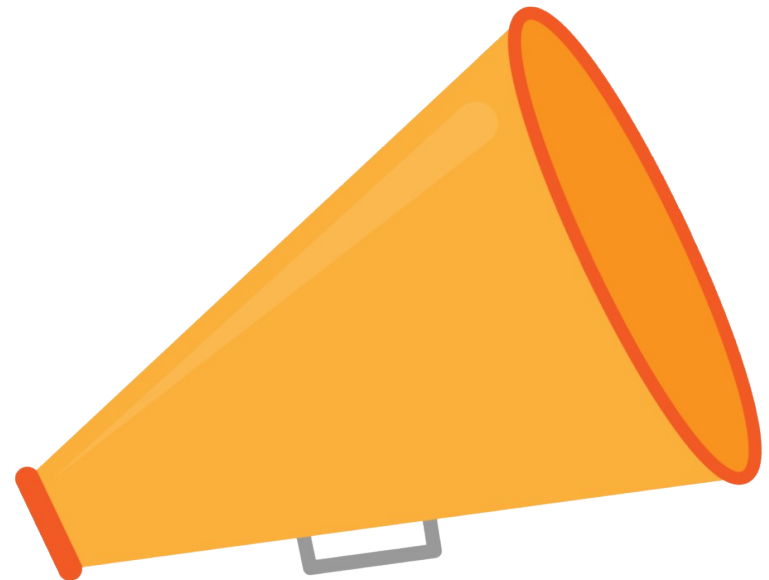
- Age: 18-56
- Sex: Men and Women
- Family Status: Head of Household, Single, Marry
- Income: Anyone with income over \$7,000



unication Techniques

Advertising Tools

- Radio****
- Fliers
- Business Cards
- Yard Signs
- Banners
- Door hangers
- Promotions/Giveaways
- T-shirts
- Feather Flags***



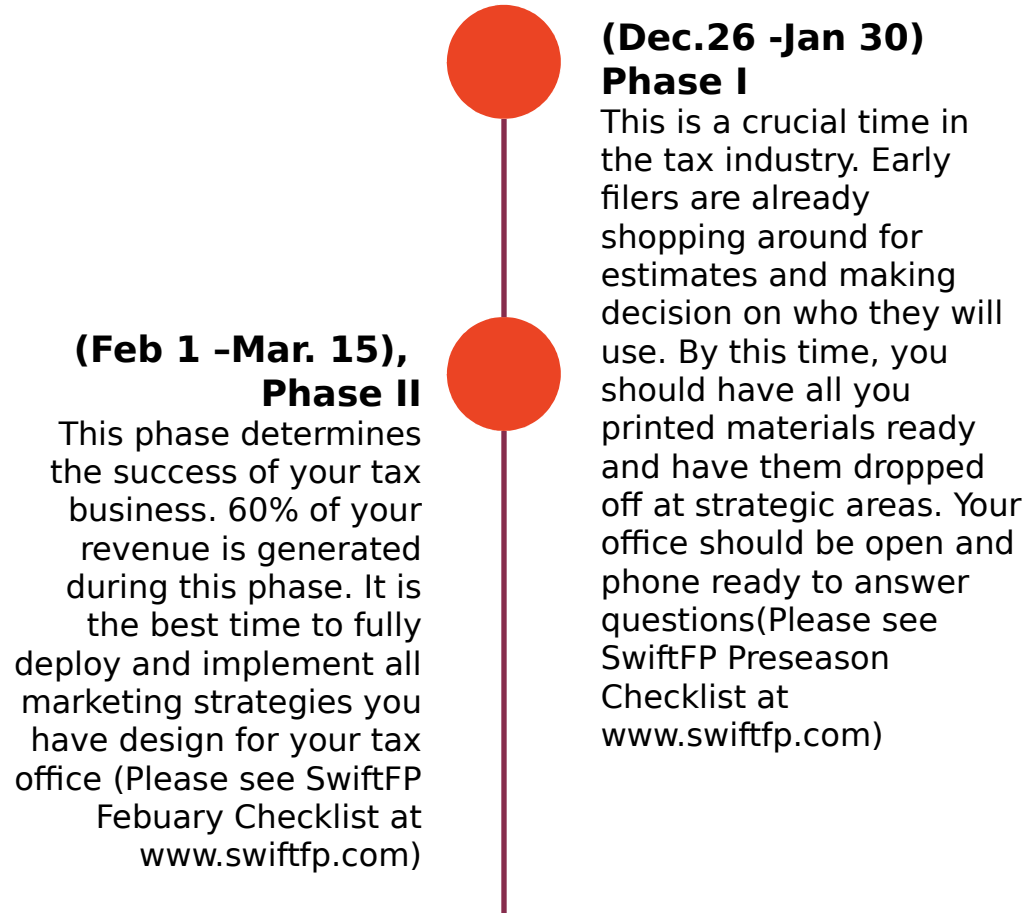
Promotions/Giveways

Design a Referral System

- Example: Issue \$25 referral to clients who refer new clients
- Issue \$20 Gas Cards to Clients who come in the first month
- Promote Your Cash Advances(up to \$5000)
- Organize a Raffle
- Promote drop-off and Pickup Service



Marketing Timeline



A vertical timeline diagram with a central purple line and two red circular markers. The top marker is aligned with the 'Phase I' text, and the bottom marker is aligned with the 'Phase II' text.

(Feb 1 -Mar. 15), Phase II

This phase determines the success of your tax business. 60% of your revenue is generated during this phase. It is the best time to fully deploy and implement all marketing strategies you have design for your tax office (Please see SwiftFP Febuary Checklist at www.swiftfp.com)

(Dec.26 -Jan 30) Phase I

This is a crucial time in the tax industry. Early filers are already shopping around for estimates and making decision on who they will use. By this time, you should have all you printed materials ready and have them dropped off at strategic areas. Your office should be open and phone ready to answer questions(Please see SwiftFP Preseason Checklist at www.swiftfp.com)



(Mar. 16 – Apr. 15).

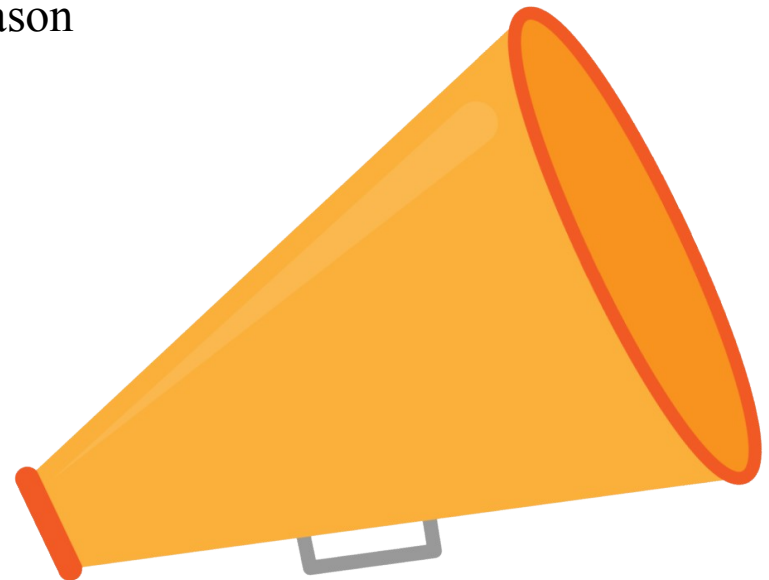
Phase III

This phase is for the late filers. There's a high probability that they will owe the internal revenue or will request an extension. You will deal with a lot more complicated returns and will have the opportunity to go after a whole new market. Market to seniors, individuals who have not filed prior year returns, those who have tax issues.

Marketing with Limited Resources

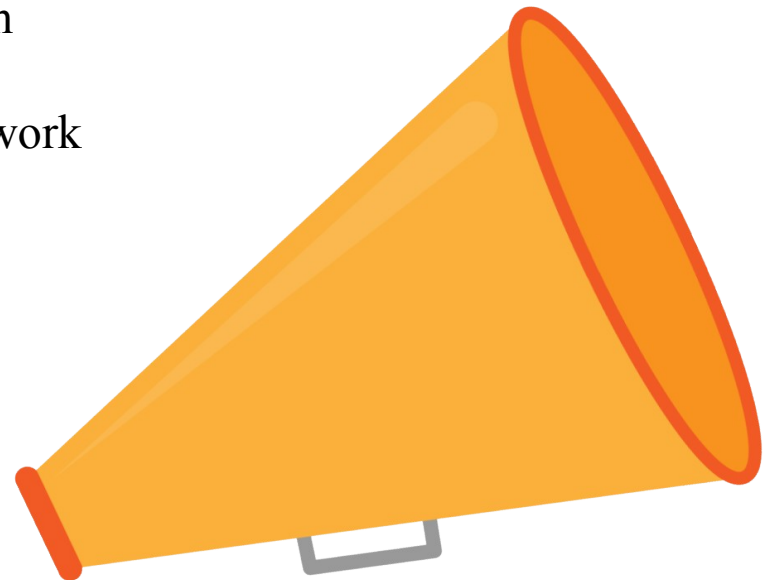
Things to do

- ✓ During your marketing planning section, you have to decide or identify your target market
- ✓ How often your going to reach them and how you plan on reaching them
- ✓ You have to design effective Ads that will be attractive and stand out from the rest.
- ✓ Give yourself enough time before the tax season to test your plan



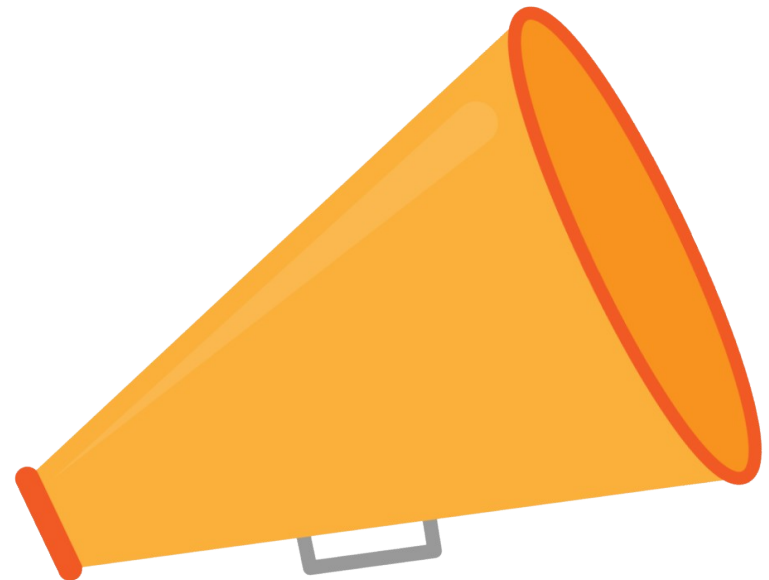
Clients Service

- ✓ Find an effective way to communicate with your clients(email, phone, text, etc)
- ✓ Create convenience for your clients; appointments, walk-ins, Drop offs, Off-site
- ✓ Send letters or postcards to prior year clients
- ✓ Find a professional phone system and custom greetings
- ✓ Use presentation folders to put clients paperwork in
- ✓ Issue new clients referral certificate



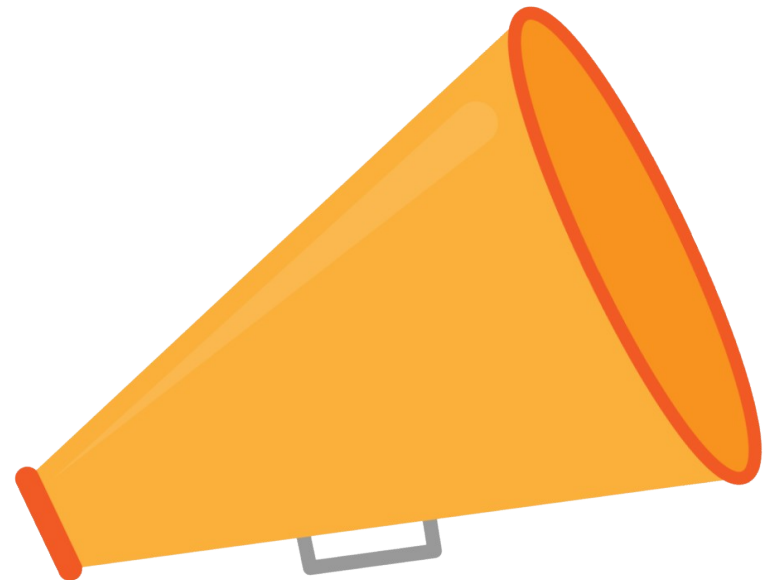
Mass Media Advertising

- ✓ Direct mailing to an clients is an awesome tool
- ✓ Every Day Direct Mailing
- ✓ Distribute door hangers door to door
- ✓ Outdoor advertising such as yard signs, banners etc.
- ✓ Social Media Blast
- ✓ Radio Advertising for some credibility



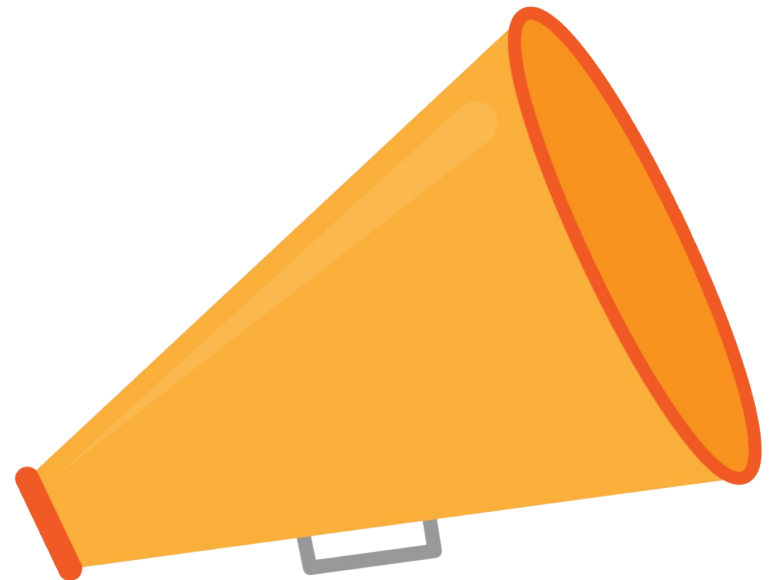
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Mass Media Advertising

- ✓ Segmenting and targeting your market
- ✓ Grand Opening Fliers
- ✓ Group Tax Brochures
- ✓ Tax Issues for Senior Citizens



Marketing Pieces Examples



4x6 Postcard



Package Envelope



Door Hangers



Appointment Card

Marketing Pieces Examples



Window Poster



Social Media cover



4x6 Flier



Indoor Poster