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businesses have A LOT on their plates.

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Certified public accountants (CPAs) and tax preparers who own their own small businesses have A LOT on their plates. On top of everything that comes with running a business — paying bills, hiring qualified employees, keeping up with new tax laws — you need to MARKET your tax services.

Well, I hope I can make that last one easier on you... More specifically:

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You can certainly market SMARTER. (And guess what else? If you're reading this, you're already on the right track!)

I'm going to lay out an easy-to-follow [tax preparer marketing plan](#) to help guide you to your most booming tax season ever.

Let's go!

1.) Send a Tax Postcard to the People Who are 12 Times More Likely to Use Your Services.

For accountant marketing, your [current tax clients](#) are your best target. They've already given you the ultimate vote of confidence — their money!

They just need to be REMINDED that you filed their income taxes before and that it's time to file again.

An existing customer is 12 times more likely to ask you to prepare their taxes again than a prospect, according to [Marketing Metrics](#). If you don't market to them, you're flat-out leaving money on the table!

Hopefully you have a database of your tax and accounting clients with contact information. If not, it's time to sort through all of those previous years' returns and create one.

Sending [personalized postcards](#) is a good way get their attention and tell them they're a valued client. Plus, they're more likely to keep your income tax postcard as a reminder to actually call your office to get started on their filing!

Using Variable Data Printing, personalized postcards customize the elements of the

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bad form on your part! Sending out tax prep postcards that offer “10% off for new clients” tells them you don’t remember or appreciate them.

That is NOT the message you want to send!

2.) Send Email Reminders for Up to a **3,700% Return on Investment** on Your Tax Marketing.

Email marketing software like [MailChimp](#) or [ConstantContact](#) can pull email addresses directly from your database and fill in your customers’ names automatically. Or, if you don’t have a database of customers, you can manually enter their emails or upload an excel spreadsheet.

When you compose your tax service marketing message, you can use a placeholder for your recipient’s name or other variable information, and the software dynamically populates it with the correct data for each customer.

So instead of sending out hundreds of emails, you just create one.

Like this:

Make sure your email is coming from a name they recognize. The “from” field of your email should use your first and last name if that’s how your clients know you. If your clients know you by a different business name, use that.

- **68% of Americans** say they base their decision to open an email on the ‘From’ name.
- **70% of people** say they always open emails from their favorite companies.

Your clients are busy, so keep it short!

Tip: Send out THREE emails over the course of several weeks to be sure you get their

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tutorial.

If you do have a Facebook page, you can upload your database of your customers' email addresses and Facebook will match them to their profiles and allow you to target ads specifically to them.

Here's how:

First, save your list in CSV format. Then go to Facebook to create a custom audience.

Start by clicking on Customer List, then follow the directions to upload your CSV file.

Facebook will ALWAYS find some errors in your file (these are usually people they can't find). Just hit "Continue Uploading File."

Once you've uploaded your list, you can create your ad. (More on this in a bit!) Remember: It costs **6-7 times more to acquire a new customer** than to retain an existing one, according to global management consulting firm Bain & Company. So hit those past clients on every possible channel you can!

4.) Analyze Your Top Client Demographics and Avoid Wasting Money Marketing to the Wrong Audience.

Sure, you can paper the walls of the local laundromat or coffee shop with tax preparation flyers, but as far as tax service marketing strategies go...

I wouldn't waste my time.

You can market your tax prep services until you're blue in the face, but **if you're not**

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Some things to pay attention to:

- Are your customers mostly personal or business filers?
- Married joint filers or singles?
- How old are they?
- What is their income bracket?
- What deductions do they have in common?
- Are they homeowners?
- Where do they live?
- Do they own businesses or rental properties?

Were your most profitable clients mostly young, active, married homeowners with multiple children and a household income of \$100k or more? Then THAT'S who you target with your tax office marketing!

Now the question is: How do you find more people like that?

See the rest of Joy's 14 Marketing Tips for tax and accounting firms.

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