

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Marketing? I don't do much — most of our clients come from word of mouth and referrals.

Until recently, anyway.

Today, small CPA firms are up against so much competition ³/₄ from do-it-yourself software to the big-budget tax powerhouses ³/₄ they find themselves wearing the new and unfamiliar hat of marketer.

Where do you even start [marketing your tax preparation services](#)?

Well, first of all: You definitely don't need to reinvent the wheel!

Here are four strategies already PROVEN to be successful for CPAs and tax preparers that you can use as a jumping-off point. These are all REAL campaigns from real clients of mine that have been approved for use. (We've blurred out all of the names and contact information.)

1. Target Your Ideal Prospects to Attract 265 High-Quality Leads

A targeted mailing list can help you reach only your ideal prospects and avoid wasting money marketing to people who are not qualified or likely to come to you to file their returns.

My most successful tax preparation clients' campaigns target one of two markets:

Early filers: Generally younger, lower-income prospects who are looking to save money on tax preparation and get the biggest possible refund.

Late filers: Older, higher-income prospects who have complicated returns and want to pay the least amount in taxes possible and avoid an audit.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

~~Results: Within two days, they made back the money they spent on the campaign.~~
Within four days, they had already doubled their investment!

<http://static.postcardmania.com/up/misc/image/447df11f/postcardmania-tax-postcard-example-2-front.jpg>

<http://static.postcardmania.com/up/misc/image/0b81f711/postcardmania-tax-postcard-example-2-back.jpg>

Strategy: Late filers. This firm mailed to 10,000 households with an income of \$100,000 or more with a message tailored to them: have your taxes prepared by a real CPA, reduce your risk of an audit, we'll review last year's tax return and be available to you year-round if issues arise.

Results: 265 responses, generating \$60,000 in revenue and clients who are likely to come back to them year after year.

2. Generate over \$11,000 in New Business with Consistent Marketing

Probably the thing small business owners struggle to understand the most is the importance of consistent, repetitive marketing.

Think about it: Why do you see the same commercials over and over and over? Because professional marketers know that repetition is the key to achieving a better return on investment (ROI).

When you reach your prospects multiple times, you create the sense that you are a stable and reputable business. It also gives you more chances to hit them at the right moment ³/₄ when they're actually thinking about filing their taxes.

<http://static.postcardmania.com/up/misc/image/dd9fb769/postcardmania-tax-postcard-example-3-front.jpg>

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

3. Establish Trust and Turn It into 30 New, Loyal & Returning Clients

Trying out a new business (especially one as important as a tax preparer) always comes with risks. Use your marketing to show your prospects that you are professional and reliable, and eliminate any friction they might feel.

Here's an example of how to do that:

<http://static.postcardmania.com/up/misc/image/c2151838/postcardmania-tax-postcard-example-4-front.jpg>

<http://static.postcardmania.com/up/misc/image/178c2214/postcardmania-tax-postcard-example-4-back.jpg>

Strategy: Establish trust and industry authority. This firm uses their postcard to tell prospects that they are experienced tax preparers, offering accurate returns and year-round unlimited consultation. And their offer of a free consultation and quote makes calling them virtually risk-free! The only thing their prospects stand to lose is their time!

Results: The firm received 45-50 inquiries and was able to convert 30 of those callers into new clients, generating about \$6,000 in immediate revenue. And by creating "long-term relationships" with their clients, that ROI will increase year after year.

4. Generate a Potential \$62,000 in Revenue with an Enticing Offer

Everybody loves a great deal.

When you're trying to convince prospective clients to do business with you, an offer that is of high perceived value to them (but doesn't cost you too much) gives you an

edge over your competitors, especially when targeting early filers who are looking to

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

[postcard-example-3-back.jpg](#)

Strategy: Database marketing. This tax preparation business sent 2,500 cards to their own list of customers and prospects, offering \$35 off one of their other services to people who brought in the postcard.

Results: They received 358 responses and closed 180 of them for an immediate revenue of \$8,000. But more than half of those customers came back for additional services, generating \$62,000 for their business!

And there you have them — four tax prep marketing strategies that have already worked for our clients:

- Targeting your ideal prospects
- Marketing consistently
- Building trust and eliminating risk
- Connecting with customers who already know and trust you for a big bump in revenue

I hope I've given you some ideas for marketing your tax preparation business and that 2017 will be your most profitable season ever!

Need more help? Call one of my marketing experts at 855-549-1313 for a FREE, no-obligation consultation, or visit our website to see even more [examples of successful tax postcards!](#)

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us