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your phone would ring in January.

Dec. 05, 2017



Marketing isn't as easy as it used to be. If you're a veteran tax preparer, you probably remember the days when you could place an ad in the yellow pages, and then your phone would ring in January.

Marketing isn't that simple anymore.

Now you have:

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In fact:

- 70% of Americans believe direct mail is more personal
- 54% of consumers say they prefer to be marketed to via direct mail
- 56% of consumers trust companies *more* who use print marketing
- Direct mail generates a 783% better response rate than email

In fact, the number of people clicking on emails overall has decreased by 65%!

So to be competitive — especially against the giant tax corporations who have endless budgets — you need to pull out all of the stops with your marketing to get your prospects' attention and get them to pick you.

But since you probably don't have a corporation-sized budget, you'll have to market smarter.

Here's how you can do that:

1. Send postcards to generate 37X the response rate of email

Start with your direct mail campaign — it'll take more time to plan.

But it's WORTH your time since direct mail can generate 37X MORE of a response over email according to data-driven marketing [research](#).

First, figure out WHO you want to mail to.

I recommend you focus on these 2 groups:

- Early filers

- Late filers

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with a company licensed to use the U.S. Postal System's National Change of Address (NCOA) database. (Hint: we're one of them!)

It's worth your money (usually just \$5/1,000 records) to make sure your mailing list addresses are valid —

Plus, you'll save money on postage by mailing to as few bad addresses as possible. (There will always be some because people move every day, BUT you can reduce it greatly.)

Once you have your mailing list, plan out your mailing dates.

Make sure you mail to prospects on each list at least 3 times between NOW and January. That way your prospects (and customers) will see your marketing message several times before they look to schedule their tax appointments.

There are 10 key postcard design elements that must be included on your direct mail piece in order to grab prospects' attention and ultimately get them calling you:

1. Clear, BOLD headline to grab attention — The recipient must immediately know what you do without having to read the card to figure it out.
2. An image or graphic that supports your message
3. Color that POPs — Doesn't have to be bright colors, but there has to be contrast so that the colors you do use POP.
4. Sub-headlines on the back that draw recipients to read your message
5. Benefits of choosing your tax business (vs. competitors) — Rather than a bunch of features about YOU or your practice, make sure you emphasize what's in it for the prospect.
6. An irresistible special offer – This can be tough, but these days, with so many super valuable things being free (Google, Facebook, etc.) you need to come up with something with a perceived high value that doesn't cost you much at all.

7. Your business's name and logo

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[Here is an example of a tax postcard](#) we designed for a CPA in California.

The card is bright to attract attention, and the headline is clear and straightforward to ensure that anyone glancing at this message knows immediately that it's for professional tax preparation.

Check out the results this postcard generated:

- 265 responses
- \$60,000 generated in revenue!

Not bad, right?

We've helped THOUSANDS of professional tax preparers over the years with their direct mail campaigns. Many of them share their successful results with us, which means that we have a large database of designs, mailing lists, offers and more that have already been proven to work and that you can STEAL to make your campaign work too.

Here are a few proven special offers you can use on your next direct mail campaign (like your 2018 tax season one!):

- Get \$30 off (or 30% off) what you paid last year
- \$99 for any tax return
- FREE e-file (can pair this with additional %-off offer)

Which offers work best for which audience (late or early filers) will depend — so your best bet is to work with a professional, experienced consultant to develop your campaign.

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You can get a unique call tracking phone number printed on your postcards, usually for an extra fee, but it makes tracking your postcard results MUCH easier!

In addition to direct mail, I recommend running online ads to get your marketing message and business seen by even MORE potential clients.

For example:

2. Use Google follow-up ads to increase response by up to 400%

Guess what:

About 96% of people who visit your website leave it *without* contacting you.

That's why you should combine your direct mail campaign with online ads — specifically, Google follow-up ads. Google follow-ups can result in up to **400%** response rate according to CMO.com.

[Here is what those online tax ads look like.](#)

When you run Google follow-up ads at the same time your postcards hit mail boxes, any prospects visiting your website and then clicking away from your website will see YOUR ads on MILLIONS of websites across the Google network.

It'll be like your ad is “following” your prospect online, so they see your ad ALL over the place... which will make your business hard to forget and easier to choose!

You can even show your ads on Google strictly based on location.

So if you're trying to get new clients for your office in Athens, GA, you can show your ads specifically to people who live in or around Athens.

This is a great way to “blanket” your marketing in an entire area!

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And the more your prospects see you, the more they'll trust you're a REAL legitimate business that's worth buying from.

Moreover, since your prospects will see your ads on websites they're already using, they can easily click on your ad when they need your services and be directed right back to your website to contact you!

Which brings me to this:

3. Reach your clients where **68% of them go EVERYDAY** — Facebook

First, if you don't have a Facebook page for your business, make sure to **get one** — it's free!

Just like with Google ads, you can run Facebook ads at the same time you run your direct mail campaign.

Access **Facebook Business**, an area that gives you access to Facebook ads, and design an ad with a call to action *and* image that matches your direct mail campaign. **Here's what that would like for this tax campaign.**

You can choose how much you want to spend on your Facebook ad.

Set a conservative budget at first, maybe \$25 or \$50 a day. That way, you can see what does and doesn't work, and tweak your ads from there as you increase your spending.

Put your special offer in the text area of your Facebook ad, **like this:**

Direct prospects who click on your ad straight to your website. You can track how many people click on your website *from* your ad easily from Facebook's ads management area.

But:

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People (and prospects) don't linger in just one spot —

- They're at home
- They're on social media
- And they're clicking around on the internet endlessly.

There's a LOT to learn about direct mail, Google and Facebooks ads, but there's no getting around using ALL 3 to drive in the MOST leads this coming tax season.

But when you're a busy business owner juggling your business, the holidays, family, life...

Even THINKING about managing marketing across 3 different platforms is enough to make your head spin.

That's why we launched a product called [Everywhere Small Business](#), so now you can hire US to run your marketing campaign for you using the top 3 lead-generating mediums:

- Direct mail
- Google
- And Facebook.

For just pennies per piece, we'll handle all of your design, printing, mailing, and online ads management.

Did I mention we'll track *when* your postcards hit mailboxes AND how many people call your office?

Plus — we'll track how many people SEE and click on your online ads.

Learn more about [Everywhere Small Business](#).

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