

TAX PRACTICE MARKETING HANDBOOK
TABLE OF CONTENTS

CHAPTER 1: MARKETING PLANNING

⇒ Strategic Marketing Planning	1
⇒ Target Market	3
⇒ Mass Marketing and Targeted Advertising	3
⇒ Reach and Frequency	3
⇒ Designing Effective Ads and Copy	4
⇒ Trade Names	4
⇒ Bootstrap Marketing	5
⇒ Test Marketing	5
⇒ Market Research	6
⇒ Marketing Evaluation	6
⇒ Advertising Residual Effects	7
⇒ Tax Service SWOT Analysis - Example	8
⇒ Tax Service Marketing Plan Outline - Example	10
⇒ Monthly Marketing Plan – Example	12

CHAPTER 2: CLIENTS

⇒ Client Service	1
⇒ Convenience (Appointments, Walk-ins, Drop-offs, Off-site)	1
⇒ Client Communication	2
⇒ Prior Client Letters & Postcards	2
⇒ VIP Gold Card	3
⇒ Client Brochures	3
⇒ Client Newsletter	3
⇒ Sample Client E-Newsletter	5
⇒ Client Presentation Folders	6
⇒ Telemarketing	6
⇒ Telephone Answering	6
⇒ Price Inquires	7
⇒ Business Cards	8
⇒ Client Referral Programs	9
⇒ New Client Referral Card – Example	10
⇒ Thank You Letter – Referral Program	11
⇒ Prior Client Calling Sheet - Blank form	12
⇒ Greeting Card	13
⇒ Promotional Gifts	13
⇒ Client Surveys	13
⇒ Net Promoter Score	13
⇒ On-Hold Marketing Script - Example	14
⇒ Client Survey Questionnaire - Example	16
⇒ We've Moved Postcard - Example	17
⇒ VIP Gold Card - Example	18
⇒ Prior Client Reintroductory Offer – Example	19
⇒ Peoples' VIP Client Newsletter - Example	21
⇒ Peoples' Brochures - Examples	29
⇒ The Income Tax School Brochure - Example	31

**TAX PRACTICE MARKETING HANDBOOK
TABLE OF CONTENTS**

⇒ Client Presentation Folders	35
CHAPTER 3: MASS MEDIA ADVERTISING	
⇒ Network Television	1
⇒ Television Script - Example	3
⇒ Radio	4
⇒ Media Buying	4
⇒ The Seven Deadly Sins of Advertising	8
⇒ Radio Scripts - Examples	10
⇒ Newspaper	20
⇒ Mass Mailing	20
⇒ Directory Advertising	20
⇒ Yellow and White Page Ads - Example	22
⇒ Outdoor Advertising	23
⇒ Mass-Transit Advertising	23
⇒ Internet Advertising	24
⇒ Pay Per Click	24
⇒ Website	25
⇒ E-Business Trends for Tax Professionals	27
⇒ Post-It Note Ad - Example	37
CHAPTER 4: TARGETED ADVERTISING	
⇒ Segmenting Your Clients	1
⇒ Direct Mail	2
⇒ New Homeowner Letter - Example	4
⇒ Newlywed Letter- Example	5
⇒ Cable TV	6
⇒ Radio	7
⇒ Newspaper	7
⇒ Magazines & Newsletters	10
⇒ Cinema Advertising	10
⇒ Telemarketing	10
⇒ Fax	11
⇒ 800 number	11
⇒ Internet Marketing	11
⇒ Optimizing Your Website	12
⇒ Direct Mail Postcard – Example	14
⇒ New Homeowner Postcard - Example	15
⇒ Newly Married Flyer - Example	16
⇒ Monthly Publication Ad – Examples	17
⇒ Weekly Newspaper Ad – Example	19
⇒ RAL Postcard - Example	20
⇒ Newspaper Advertorial - Example	21
⇒ Cinema Advertising - Example	22

**TAX PRACTICE MARKETING HANDBOOK
TABLE OF CONTENTS**

CHAPTER 5: OTHER ADVERTISING

⇒ Grand Opening Events	1
⇒ Promotional Gifts	1
⇒ Trade Show Exhibits	2
⇒ Tax Seminars	3
⇒ Business Cards	4
⇒ Coupons	4
⇒ Employee Group Tax Plans	5
⇒ Credit Union & Other Group Tax Plans	6
⇒ Other Group Tax Plan	6
⇒ Associate Referral Coupons	6
⇒ Associate Referral Coupon - Example	7
⇒ Associate Referral Letter - Example	8
⇒ Graduate Gift Certificates	9
⇒ Guarantee	9
⇒ Gift Certificate - Examples	11
⇒ Peoples' Tent Card - Example	13
⇒ Grand Opening Newspaper Ad - Example	14
⇒ Grand Opening Invitation - Example	15
⇒ Peoples' Grand Opening Photos	17
⇒ Grand Opening Flyers - Examples	18
⇒ Trade Show Displays - Example	21
⇒ Tax Issues for Women Flyer - Example	23
⇒ Business Card - Examples	24
⇒ Group Tax Brochure - Example	25
⇒ Credit Union Discount - Example	27
⇒ Merchant Discount - Example	28
⇒ Anniversary Promotion - Example	29

CHAPTER 6: PUBLIC RELATIONS

⇒ Your Public Image	1
⇒ Publicity	1
⇒ Press Releases	1
⇒ Media Contacts	1
⇒ Press Releases - Examples	3
⇒ Obtaining Media Coverage	7
⇒ Becoming an Author	7
⇒ Reprints of Articles	7
⇒ Public Speaking	8
⇒ Business Cards & Stationary	9
⇒ Employee Sales Training & Tools	9
⇒ Handling Income Telephone Calls	9
⇒ Free Public Services	9
⇒ Senior Citizen Accommodations	10
⇒ Volunteer Community Service	10
⇒ Trade Association Activity	11

**TAX PRACTICE MARKETING HANDBOOK
TABLE OF CONTENTS**

⇒ Networking	11
⇒ Referrals (Suppliers, Friends & Professionals)	12
⇒ Hosting an Open House	12
⇒ Memberships	13
⇒ Networking Contact Letters - Examples	14
⇒ Open House Invitation - Example	16

CHAPTER 7: TAX OFFICE SIGNAGE

⇒ Exterior Signs	1
⇒ Window Signs	2
⇒ Store Front Banners	2
⇒ Interior Signs & Displays	3
⇒ Mass-Transit Signage	3
⇒ Directional Signs & Billboards	4
⇒ Examples of Signage & Offices	5

CHAPTER 8: PRICING

⇒ The Market	1
⇒ The Competition	1
⇒ Competitor's Sign - Example	2
⇒ Pricing Philosophy	3
⇒ Client Screening	4
⇒ Price Inquiries	4
⇒ Payments and Gift Certificates to Clients/Fee Refund Policies	4
⇒ Standard Schedules of Charges	5
⇒ Telephone Phone Price Estimates & Pricing Worksheets	5
⇒ Practicing Pricing Returns	5
⇒ Computer Pricing	5

CHAPTER 9: MARKETING SERVICES

⇒ Advertising Agencies	1
⇒ Graphic Arts	1
⇒ Copywriting	2
⇒ Photography	2
⇒ Public Relations	3
⇒ Media Buying	3
⇒ TV & Radio Commercial Production	3
⇒ Reproduction	4
⇒ Printing	4

CHAPTER 10: REFERENCES

⇒ Marketing Tools and Resources	1
⇒ Marketing Information	5
⇒ Sales Leads & Mailing Lists	6
⇒ Glossary of Marketing Terms	7