

**TAX PRACTICE MARKETING HANDBOOK
TABLE OF CONTENTS**

CHAPTER 1: INTRODUCTION TO MARKETING PLANNING

| | |
|---|----|
| ⇒ Strategic Marketing Planning | 1 |
| ⇒ Mission Statement | 1 |
| ⇒ SWOT Analysis | 1 |
| ⇒ Marketing Plan | 3 |
| ⇒ Monthly Marketing Calendar | 5 |
| ⇒ Target Market | 6 |
| ⇒ Mass Marketing and Targeted Advertising | 6 |
| ⇒ Reach and Frequency | 6 |
| ⇒ Trade Names | 7 |
| ⇒ Bootstrap Marketing | 7 |
| ⇒ Test Marketing | 8 |
| ⇒ Market Research | 8 |
| ⇒ Marketing Evaluation | 9 |
| ⇒ Advertising Residual Effects | 10 |

CHAPTER 2: CLIENTS

| | |
|------------------------------------|----|
| ⇒ Client Communication | 1 |
| ⇒ Prior Client Letters & Postcards | 1 |
| ⇒ Loyalty Programs | 3 |
| ⇒ VIP Gold Card | 3 |
| ⇒ Client Brochures | 4 |
| ⇒ Client Newsletter | 4 |
| ⇒ Client E-Newsletter | 5 |
| ⇒ Tax School Brochure | 7 |
| ⇒ Client Presentation Folders | 7 |
| ⇒ Inside Sales / Telesales | 8 |
| ⇒ Telephone Answering | 8 |
| ⇒ On-Hold Marketing | 9 |
| ⇒ Price Inquires | 10 |
| ⇒ Business Cards | 12 |
| ⇒ Client Referral Programs | 13 |
| ⇒ New Client Gift Cards | 15 |
| ⇒ Greeting Cards | 15 |
| ⇒ Client Surveys | 15 |
| ⇒ Net Promoter Score | 16 |

CHAPTER 3: MASS MEDIA ADVERTISING

| | |
|--|----|
| ⇒ Designing Effective Ads and Copy | 1 |
| ⇒ Network Television | 2 |
| ⇒ Television Script - Examples | 3 |
| ⇒ Radio | 4 |
| ⇒ Media Buying | 4 |
| ⇒ The Seven Deadly Sins of Advertising | 8 |
| ⇒ Newspaper | 10 |

TAX PRACTICE MARKETING HANDBOOK

TABLE OF CONTENTS

| | |
|---|----|
| ⇒ Mass Mailing | 11 |
| ⇒ Directory Advertising | 11 |
| ⇒ Flyer Mailings | 12 |
| ⇒ USPS Direct Mail | 12 |
| ⇒ Outdoor Advertising | 14 |
| ⇒ Mass-Transit Advertising | 14 |
| ⇒ Internet Advertising | 15 |
| ⇒ Pay-Per-Click | 16 |
| ⇒ Google AdWords | 17 |
| ⇒ Social Media | 24 |
| ⇒ Social Media Advertising Guide | 24 |
| ⇒ Peoples Tax Social Media Guide | 32 |
| ⇒ Why Have a Website | 40 |
| ⇒ Search Engine Optimization | 41 |
| ⇒ Being Mobile Friendly | 41 |
| ⇒ E-Business Trends for Tax Professionals | 43 |
| ⇒ Why Your Firm Should Have a Blog | 50 |

CHAPTER 4: TARGETED ADVERTISING

| | |
|---------------------------------|----|
| ⇒ Segmenting Your Clients | 1 |
| ⇒ Direct Mail | 2 |
| ⇒ Letters | 3 |
| ⇒ Coupon Pack/Magazine Mailings | 7 |
| ⇒ Postcards | 7 |
| ⇒ Graduate Gift Certificates | 9 |
| ⇒ Bilingual Tax Preparers | 10 |
| ⇒ Cable TV | 10 |
| ⇒ Radio | 10 |
| ⇒ Newspaper | 11 |
| ⇒ Magazines & Newsletters | 14 |
| ⇒ Cinema Advertising | 16 |
| ⇒ Telemarketing | 16 |
| ⇒ 800 Numbers | 16 |
| ⇒ Internet Marketing | 16 |

CHAPTER 5: OTHER ADVERTISING

| | |
|--|----|
| ⇒ Grand Opening Events | 1 |
| ⇒ Promotional Gifts | 6 |
| ⇒ Open House Event | 6 |
| ⇒ Trade Show Exhibits | 11 |
| ⇒ Tax Seminars | 14 |
| ⇒ Business Cards | 16 |
| ⇒ Coupons | 17 |
| ⇒ Employee Group Tax Plans | 17 |
| ⇒ Credit Union & Other Group Tax Plans | 19 |

**TAX PRACTICE MARKETING HANDBOOK
TABLE OF CONTENTS**

| | |
|--------------------------------|----|
| ⇒ Local Merchants | 21 |
| ⇒ Other Group Tax Plan | 24 |
| ⇒ Associate Referral Coupons | 24 |
| ⇒ Graduate Gift Certificates | 27 |
| ⇒ Guarantee | 27 |
| ⇒ Tent Card | 21 |
| ⇒ Peoples Tax Triple Guarantee | 29 |

CHAPTER 6: PUBLIC RELATIONS

| | |
|--|----|
| ⇒ Your Public Image | 1 |
| ⇒ Publicity | 1 |
| ⇒ Press Releases | 1 |
| ⇒ Media Contacts | 1 |
| ⇒ Press Releases - Examples | 3 |
| ⇒ Obtaining Media Coverage | 11 |
| ⇒ Becoming an Author | 11 |
| ⇒ The Top Ten Causes of Taxpayer Pain | 12 |
| ⇒ Reprints of Articles | 16 |
| ⇒ White Papers | 16 |
| ⇒ Public Speaking | 16 |
| ⇒ Business Cards & Stationary | 17 |
| ⇒ Employee Sales Training & Tools | 17 |
| ⇒ Handling Income Telephone Calls | 18 |
| ⇒ Free Public Services | 18 |
| ⇒ Senior Citizen Accommodations | 18 |
| ⇒ Volunteer Community Service | 18 |
| ⇒ Trade Association Activity | 19 |
| ⇒ Networking | 19 |
| ⇒ Referrals (Suppliers, Friends & Professionals) | 20 |
| ⇒ Hosting an Open House | 23 |
| ⇒ Memberships | 26 |

CHAPTER 7: TAX OFFICE SIGNAGE

| | |
|----------------------------------|---|
| ⇒ Exterior Signs | 1 |
| ⇒ Window Signs | 3 |
| ⇒ Store Front Banners | 4 |
| ⇒ Interior Signs & Displays | 5 |
| ⇒ Mass-Transit Signage | 7 |
| ⇒ Directional Signs & Billboards | 8 |
| ⇒ Examples of Signage & Offices | 9 |

CHAPTER 8: PRICING

| | |
|----------------------|---|
| ⇒ The Market | 1 |
| ⇒ The Competition | 1 |
| ⇒ Pricing Philosophy | 2 |

**TAX PRACTICE MARKETING HANDBOOK
TABLE OF CONTENTS**

| | |
|---|---|
| ⇒ Client Screening | 3 |
| ⇒ Price Inquiries | 3 |
| ⇒ Payments and Gift Certificates to Clients/Fee Refund Policies | 4 |
| ⇒ Standard Schedules of Charges | 4 |
| ⇒ 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 | 5 |

CHAPTER 10: REFERENCES

| | |
|---------------------------------|---|
| ⇒ Marketing Tools and Resources | 1 |
| ⇒ Marketing Information | 4 |
| ⇒ Sales Leads & Mailing Lists | 5 |
| ⇒ Glossary of Marketing Terms | 6 |