

## Marketing Your Tax Preparation Business

Marketing is about understanding your customers and building and maintaining relationships with them using various strategies. Marketing is crucial for businesses that are just entering the industry. It is also important for long-standing companies to pursue new marketing efforts so that they may continue to grow their business. It starts by asking consumers who they are, what they want, and what they care about. Once you understand this, you can generate strategies and deliver the best methods of communication and compelling material to your target audience. With multiple approaches, it will be easy to find the right marketing strategies that work best for your business. A critical thing to remember is, marketing can be effective without breaking the bank.



# Referral Program

Referral programs are a win-win for everybody and a simple way to grow your business. Happy customers refer others to your company and are rewarded for their efforts. It is inexpensive as the business only pays out when new business comes in. This strategy has the potential to continue building on itself for as long as the referral program is in place.

# Social Media

Use social media platforms to connect with your audience, build your brand, increase sales, and drive website traffic. This involves creating relevant content on your social media profiles, listening to and engaging your followers, analyzing your results, and running social media advertisements.

- **LinkedIn:** Build a professional network that could lead to new ventures and advertising opportunities.
- **Twitter:** The trick to Twitter is posting daily and keeping your followers up-to-date.
- **Facebook:** Facebook ads excel at advanced targeting. Promote outside your followers by using the boost tool.



# List Your Business

List your company through Google Business. This will allow potential customers to view your hours, call your company directly, and quickly find your location. This listing will also provide people with a quick link and easy access to your website where the real marketing happens.

# Establish a Network

Establishing your online presence is excellent, but don't forget to join business associations or groups within your community. Find ways to get involved that will allow you to meet new contacts and create more brand awareness. If possible, sponsor events to promote your name while also being a good community steward. Give away promotional items with your company name, logo, and contact info on them. T-shirts are a great example of free walking advertisements for your business.





## Search Engine Optimization (SEO)

Search engine optimization optimizes your website to get organic, or un-paid, traffic from the search engine results page. It is the process of making your website more attractive to a search engine than your competitors. Using specific keywords in your websites, videos, social media posts, etc., can lead to a top spot in the search engine when a potential customer searches for “professional tax preparer” or “tax preparation services.” Content is also essential to keep in mind. The more quality, relevant content pieces that you have on your site, the more likely search engines will be to rank your pages higher on the search engine results page. This content spans across multiple marketing channels, much like keywords. By improving your SEO, you can work to expand your visibility on the search engines. This helps you reach and engage more potential customers.

## Contests & Giveaways

Running online contests can capture new leads, nurture current prospects, and engage customers. It is a cost-effective marketing channel that allows you to earn some publicity and give you a positive image. Giving away cash prizes or other merchandise is an easy way to gain some viral potential and improve your brand's image.

## Host a Seminar

By hosting a seminar, you can let your potential clients know your business's value and what they can expect by using you in the future. This is an excellent opportunity to promote your business while offering your knowledge to others.



## Email Marketing

Most small businesses are working with limited marketing budgets, which means they don't have the money to waste on paid advertisements. Email marketing is inexpensive and effective. It provides a professional and direct medium that allows businesses to reach out to their leads and customers. Most customers prefer email because it is convenient, personal, and instant.

## Direct Mail

Direct mail can be useful for current and new customers. As online channels become more and more saturated with content, fewer companies look to direct mail, which means opportunity for you. Be sure to utilize special offers, features, and pricing within letters, postcards, and promotional packets.



## About IND Solution Professional Tax Software

**At IND Solution Professional Tax Software, continuous improvement is not just a motto; it drives our brand ideals and values.**

IND Solution Professional Tax Software was conceived to fill a gap in the tax software industry for an online, cloud-based program that is technologically advanced and fills the unique needs of today's tax preparation environment. Decades old, inflexible desktop programs still require cumbersome installation and downloads, lack mobility, and are more expensive. IND Solution Professional Tax Software requires no networking or downloads, is **completely mobile**, and provides a fast, accurate, and easy to use tax preparation software that is packed with all the productivity tools you need to run a successful tax business. We offer **affordable plans** for the one person tax office to preparers with multiple offices and numerous preparers. Paired with our client portal and financial product offerings, your business can be anything you imagine it to be.

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Our promise to you...  
relentless pursuit of  
maximum productivity.

*IND Solution Professional  
Tax Software Team*