Client Acquisition & Marketing

Master Study Guide

1. Marketing and Visibility

Core Principle

- A tax office without clients is only a business idea.
- Having a PTIN, EFIN, software, or office location does not automatically bring clients.
- Clients must know the business exists before they can choose it.
- Marketing is about making sure the right people know you exist when they need help.

Learning Objectives

- Identify the ideal client.
- Position the business in the marketplace.
- Build a recognizable brand.
- Generate referrals.
- Market online and offline.
- Create year-round visibility.
- Turn prospects into paying clients.

2. Identifying the Ideal Client

Examples of Ideal Clients

- W-2 employees
- Self-employed individuals
- Small business owners
- Truck drivers
- Healthcare workers
- Real estate professionals
- College students
- Single parents
- High-income earners

Questions to Ask

- Who do I want to work with?
- What tax situations am I comfortable handling?
- What services do I want to be known for?

Key Takeaway

- The clearer you are about who you serve, the easier your marketing becomes.
- When you market to everyone, you connect with no one.

3. Branding and Trust

What a Brand Includes

- Reputation
- Communication style
- Social media presence
- Client experience
- Professionalism

Strong Brand Characteristics

- Consistent
- Professional
- Trustworthy
- Recognizable
- Educational

What Builds Trust

- Client testimonials
- Professional content
- Educational posts
- Consistent branding
- Positive reviews

Key Takeaway

- People often choose the tax preparer they trust, not necessarily the cheapest one.
- Trust is one of the strongest marketing tools you can build.

4. Social Media Marketing

Platforms to Consider

- Facebook
- Instagram
- TikTok
- LinkedIn
- YouTube

Content Ideas

- Tax tips
- Due date reminders
- Tax myths
- Tax law updates
- Frequently asked questions
- Client success stories
- Behind-the-scenes content
- Business owner tips

Posting Strategy

- Focus on consistency over perfection.
- A consistent presence builds visibility.

Example Weekly Schedule

- Monday - Tax Tip
- Tuesday - Client Testimonial
- Wednesday - Educational Video
- Thursday - Frequently Asked Question
- Friday - Business Owner Content

5. Referral Marketing

How to Encourage Referrals

- Provide excellent service
- Follow up with clients
- Ask for reviews
- Offer referral incentives where appropriate
- Stay connected year-round

Why Referrals Work

- Referrals often convert well because trust is already established.
- The new prospect is borrowing credibility from someone they already know.

Key Takeaway

- Happy clients are often your best marketing strategy.

6. Community Marketing

Community Marketing Ideas

- School sponsorships
- Back-to-school events

- Community giveaways
- Vendor events
- Local networking groups
- Small business expos
- Financial literacy workshops

Benefits

- Increased visibility
- Brand recognition
- Community trust
- Referral opportunities

Key Takeaway

- People support businesses they see supporting the community.

7. Networking and Referral Partners

Potential Referral Partners

- Credit repair companies
- Real estate agents
- Insurance agents
- Bookkeepers
- Payroll providers
- Business consultants
- Notaries

Networking Goal

- Focus on building genuine relationships rather than immediately asking for referrals.

Key Takeaway

- Your network can become one of your most valuable business assets.

8. Lead Generation and Tracking

Online Lead Sources

- Social media
- Website inquiries
- Google Business Profile
- Paid advertising
- Referral programs

Offline Lead Sources

- Networking events
- Community events
- Flyers
- Business cards
- Partnerships

Lead Tracking

- Ask every client: How did you hear about us?
- Track where clients come from so you can identify which marketing strategies are producing results.

Key Takeaway

- What gets measured gets improved.

9. Converting Prospects into Paying Clients

Best Practices

- Respond quickly
- Be professional
- Provide clear information
- Explain your process
- Follow up consistently

Common Mistakes

- Slow response times
- Lack of follow-up
- Poor communication
- Inconsistent pricing

Key Takeaway

- Most sales are lost because of poor follow-up, not poor marketing.

10. Client Retention

Retention Strategies

- Excellent service
- Follow-up communication
- Birthday messages
- Tax reminders
- Newsletters
- Client appreciation events

Why Retention Matters

- Returning clients are easier to serve.
- Returning clients are less expensive to retain.
- Returning clients are more likely to refer others.

Key Takeaway

- The easiest client to market to is an existing client.

11. Year-Round Marketing

May - August

- Business owner education
- Bookkeeping promotion
- Credit services
- Community events

September - December

- Tax planning
- Business consultations
- Team recruitment
- Pre-season marketing

January - April

- Tax preparation
- Refund advances
- Bank products
- Referral campaigns

Marketing Rule

- Never stop marketing just because tax season ends.
- Visibility creates opportunities. Consistency creates growth.