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Checkpoint® Marketing for Firms

2020-2021 TAX PRACTICE MARKETING GUIDE

Contents

IF YOU HAVE ANY QUESTIONS ABOUT WAYS TO USE YOUR TAX GUIDE OR OUR OTHER CONTENT MARKETING TOOLS TO BUILD YOUR TAX PRACTICE, PLEASE CALL US AT 800.431.9025, OPTION 3, 2, 4.

INTRODUCTION

Informing clients and other taxpayers about ways to save tax and achieve their financial goals is a proven way to position your firm as a thought leader and encourage contact that builds client relationships. This is exactly what the Checkpoint® *Tax Planning Guide* is designed to do.

To benefit fully from this versatile content marketing, business development and client retention tool, you need to share the guide in a way that maximizes readership, as well as to leverage it with other activities, such as social media posts, emails and follow-up calls. To help you do this, we've put together this ***Tax Practice Marketing Guide***. In it we:

- Present ideas for increasing the impact of each guide format
- Explain why to use both print and electronic formats
- Suggest other tools for marketing your tax practice
- Provide a sample email, cover letter and social media post to present your guide

Our goal is to help you increase awareness of your tax services and encourage readers to contact you for assistance in selecting and implementing appropriate tax planning strategies.

We hope you find this information helpful in strengthening your tax practice. If you have any questions about the ideas we present here or other marketing and client communication matters, please contact your Account Coordinator, Arti Kapoor, at 972-798-5068 or arti.kapoor@tr.com.

We thank you for choosing our tax planning guide and wish you much success in using it to nurture clients, generate leads and grow your tax business.

GET THE MOST FROM YOUR *TAX PLANNING GUIDE*

Here are suggestions for maximizing the effectiveness of your ***Tax Planning Guide*** in increasing awareness of your tax services, generating new business leads and building stronger — and more profitable — client relationships.

ONLINE TAX GUIDE

Adding the online ***WebTaxGuide*** or a PDF of the print ***Tax Planning Guide*** to your website can be a cost-effective way to provide clients and others with information about tax planning strategies. But you can't assume that just because you post the guide on your website it will be seen and read. If someone doesn't visit your website and click to view your tax guide, it won't matter that it's there.

That's why you may want to do things like the following to increase the viewing and impact of your online tax guide:

Highlight your guide on your website.

On your home page — as well as other appropriate pages, such as your tax services page — use an eye-catching element to make the link easy to find and encourage visitors to view your online tax guide. This might consist of:

- An image of the guide or of something representing taxes or tax planning
- Large or bolded text in a header, body copy, a box or a sidebar that invites visitors to look through your guide and that links to it, so they can get to it with just a click

You might even consider running a tax quiz or game on your website that encourages visitors to look up the answers in your online guide.

Use other communications to drive traffic to your guide.

In your emails (especially in the signature line), social media posts, correspondence, newsletters, press releases, marketing materials and other communications, include an invitation to visit your website and view your online tax guide. Just be sure to include a hyperlink to (or the URL for) the web page where visitors can view the guide.

Send an email about your guide to clients, prospects and referral sources.

To let clients and others know about your online guide, you can email them a link to the page on your website where they can view it. For ***WebTaxGuide,*** consider using our email ***Flex-E-TaxGuide***, which features a template that links directly to the ***WebTaxGuide***.

Use social media to draw attention to your guide.

Link to your online guide from your firm's social media pages and highlight it with some engaging and attention-getting text and an image. A post like this will help awareness of your guide and encourage visits to your website to view it and learn more about your tax services. (If you ordered your tax guide by the Early Bird deadline, you will have received our package of social media posts and already have everything you need for a series of such posts.)

In addition, consider posting things like these to drive visitors to your online guide through your social media pages:

- Tax-related information that connects readers to your online guide; for example, a "tax tip of the day," "best tax-saving idea of the week" or "monthly tax fact"
- A summary of a tax-planning issue or strategy, with a link to the page in the online guide that discusses it more fully
- A question for which readers can find the answer in your online guide
- Periodic reminders about the need for tax planning, with a link to your online guide

Also, encourage partners and other members of your firm to post about your online guide, as well as things like those described above, on their personal social media pages. Staff involvement and engaging messages are key components to the success of your social media program. So, encourage your staff to interact with your social posts to maximize the reach and impact of your shared content.

Here are instructions and suggestions for using Facebook, LinkedIn and Twitter to drive traffic to your online guide:

Facebook

Posting your online guide to your Facebook page couldn't be easier. Simply click the Facebook icon in the upper corner of the home page of your guide; then select the "Share on a Page You Manage" option from the drop-down at the top of the window. Feel free to include your own message to accompany your online guide in the "Say something about this" area of the window. Click "Post to Facebook" and your guide will be shared with the primary Online Guide header image.

LinkedIn

On your LinkedIn company page, paste the URL for your online guide in the "Start a Post" field. You can overwrite the URL with a message of your choosing. We recommend including the online guide image we have provided. First, click here to download the image and save it to your computer. Then click the camera icon, browse your files and select that image. Click the Post button and your online guide will be shared with the header image you included. (If you ordered your tax guide by the Early Bird deadline, you will have received our package of social media posts and will have access to additional image options.)

You can also feel free to add any relevant hashtags you would like, so your online guide can be found more easily within LinkedIn.

Twitter

Using your desktop view, click on the "Tweet" button located in the bottom-left area of your Twitter account below the sidebar with your tools. Alternatively, locate the "What's happening?" area at the top of your Twitter Feed under Home.

Compose a short message (limited to 280 characters) related to your online guide. Paste the URL to your online guide after your text in the Tweet window. Twitter will automatically shorten your link and let you know when you have exceeded the 280-character limit. You can also use a third-party social media management tool to shorten your link in advance of posting your update. You can add a photo or image to your Tweet by clicking on the Image icon. Click the "Tweet" button to post your Tweet.

Alternatively, you can simply click the Twitter icon in the upper right area on the home page of your online guide.

We recommend posting your online guide periodically to social media to get some additional exposure to your guide.

Personalize your guide with your logo and contact information.

For the ***WebTaxGuide***, make sure each page is branded with your firm's name and logo, and that the "contact us" button links to a page on your website that has the contact info you wish to include. For the PDF guide, have your logo and contact information on the front cover, and personalize the back and inside covers with information about your firm, services and partners.

Some personalization of your online guide may be free with your purchase. If you haven't already taken advantage of this opportunity to increase the effectiveness of your guide for building brand awareness and marketing your tax services, email us at checkpointmarketing.taxguides@thomsonreuters.com for more information.

EMAIL TAX GUIDE

The ***Flex-E-TaxGuide*** enables you to send out a personalizable HTML email template that links to the ***WebTaxGuide*** (included). It's best to have the links open directly onto the guide (or the guide section you're directing attention to) or onto your home page, where ideally the link to your online guide is prominently displayed.

Here are some things you can do to maximize the likelihood that your email is opened and recipients click through to see the online guide:

Think hard about the subject line.

Take care to craft one that gets recipients to open your tax guide email — for example, "Are you taking all of the tax breaks available to you?"

Personalize the sending address.

Clients and other intended readers are more likely to open an email addressed personally to them from one of your partners than a generic email from your firm. Recipients are also more likely to click on a link to your online guide if there's a personal message from someone they know, especially if the message (or subject line) points out some tax law or strategy a partner thinks would be of particular interest to a recipient.

Make sure you have a good, up-to-date list (and permission to email).

As in direct mail, the quality of your list is perhaps the single biggest determinant of a campaign's success. Email addresses change more frequently than postal addresses, so you'll need to regularly maintain your database if you want to avoid a lot of bounce-backs. Of course, if you don't have an email address for everyone you want to send your online guide to, you'll need to get it. Just make sure you also have permission to email everyone you'd like. If you email people, such as prospects, without their permission, you'll annoy them and possibly risk being blacklisted for sending spam.

Follow up with a phone call or another email.

To leverage emails about your online guide, consider having members of your firm follow up with a phone call to see if they could answer any questions about the subjects the guide discusses.

Use the guide template for other tax-related communications.

You can use the *Flex-E-TaxGuide* or other template to send out additional tax-related information that drives clients and prospects to your *WebTaxGuide.* For example, you could use the template to highlight a different tax topic on a monthly basis and encourage recipients to view the online guide for more information. Or, to target various audiences, you could periodically send out an email that links to a specific section of the *WebTaxGuide*.

PRINT TAX GUIDE

Print *Tax Planning Guides* are a tangible representation of your firm. With their booklet design and extensive areas for personalization, they can make a strong impression that enhances your professional image. Print guides therefore give you a great way to introduce your firm to prospects or remind clients and referral sources about your tax services. Many readers will keep them as reference items, so these booklets will help increase brand awareness and have a favorable impact long after you distribute them.

Include the guide in mailings, information packets and proposals.

The print *Tax Planning Guide* is perfect for use in direct mail campaigns aimed at presenting strategies your target audience can use to reduce taxes and suggesting that they contact you for tax planning and preparation services as well as information on tax law changes. You can also include copies in other mailings, as well as welcome packets or proposals, and display some in your reception area and client meeting rooms.

Send out the guide as a thank-you or holiday gift.

The print *Tax Planning Guide* is a great way to thank clients for their business. Include copies with tax returns or financial statements, send them out as a thank-you for payment, or present them as a birthday or holiday gift.

Follow up with a phone call or email.

Giving or sending out the print *Tax Planning Guide* provides a basis for following up with a phone call or email to see if you could be of assistance or answer questions about the subjects discussed. A phone conversation can help you learn about the taxpayer and identify ways you might be of service. At a minimum, the call helps to strengthen your relationship and can lead to an in-person meeting or request for assistance at a later time.

WHY USE BOTH PRINT AND ELECTRONIC GUIDES

To maximize the marketing impact of your guide, consider using both print and electronic formats. Not everyone prefers email, and open rates can be less than you would like. Similarly, some in your target audience may not read your social media posts or visit your website, so they may never see your guide and the branding or message you have on it.
To make it more likely that all members of your target audience will look at your guide, you'll need to present it in the format and deliver it via the medium each one prefers.

To this end, you may want to send an email, post a form on your website, or ask in a conversation which format and means of delivery a client, prospect or referral source prefers. Enter these preferences into your database, and deliver your guide accordingly. Integrating print and email guides will enable you to optimize both impact and cost-effectiveness.

MORE WAYS TO MARKET YOUR TAX PRACTICE

TAX LAW UPDATES

To help you show thought leadership and position your firm as an expert on tax matters, if a major tax law change occurs before July 1, 2021, you'll receive a FREE electronic ***Tax Law Change Update*** via email. You can post it on your website and email it (or a link to it) to clients, prospects and referral sources to inform them about the change. You can even print it out on your letterhead or template to use as a handout or include with guides you have yet to distribute.

If you've purchased the ***WebTaxGuide*** or the ***Flex-E-TaxGuide***, affected pages of your online guide will automatically be updated after changes occur. But proactively notifying your contacts about updated information can help position your firm as a thought leader.

By emailing the updates to clients and contacts, you can quickly and easily get the word out about tax law changes — and position yourself as an advisor who's on top of the latest developments in tax law. The updates also give you another opportunity to touch your target audience and keep your name top of mind with clients, prospects, referral sources and the media.

NEWSLETTER, SOCIAL MEDIA AND OTHER CONTENT MARKETING TOOLS

Because regular contact is essential for converting prospects into clients and developing new business from existing clients, we recommend that, in addition to using the ***Tax Planning Guide***, you email or mail out a personalized tax newsletter to share helpful information on a year-round basis. This will help your firm cultivate prospects, keep in touch with clients and stay top of mind for tax services.

We can help. Most of our newsletters deal with tax issues, often on a niche-specific basis. But you may especially want to consider ***Tax Impact, Focus*** and ***Management & Tax Concepts***, which address a broad range of tax subjects relevant to individuals and businesses. ***Wealth Management Advisor*** covers financial and tax planning for individuals, while ***Insight on Estate Planning*** and ***The Estate Planner*** discuss strategies for minimizing taxes associated with transferring assets from one generation to the next.

To communicate more frequently, consider our Social Media Solutions product line. You can use our ***Emerging Tax and Regulation Alerts*** (roughly 18 per year) or our weekly ***Individual Tax Briefs*** or ***Small Business Tax Briefs*** on your blog or social media. Or post content to social media daily with our ***Federal Tax Posts***.

If you'd like to apprise your clients and other contacts of state and local tax developments, contact us to find out if our ***SALT Posts*** product is available for your state.
You can also use email or social media to push out short summaries (included) with links to the full text of tax-related articles from our online ***Content Store***. Sharing these items will help demonstrate thought leadership, enhance your brand and encourage contact for tax services. (If you ordered your ***Tax Planning Guide*** by the Early Bird deadline you will have received our package of individual and business tax articles, and this is one way you can use those articles.)

REMEMBER TO FOLLOW UP!

No matter how engaging and informative your ***Tax Planning Guide*** and other content is, it still is not enough to simply send out or post a guide, newsletter, tax alert or article and wait for business to come in. You need to proactively contact prospects, clients and referral sources to see how you can be of service or answer questions about the subjects these publications discuss.

Also, consider having partners send a personal note or email after tax season to clients. The message can thank them for giving your firm the opportunity to be of service and encourage them to call with any tax-related questions. Follow-up like this can help ensure that clients look to you, rather than a competitor, for future tax services.

SAMPLE EMAIL, COVER LETTER AND SOCIAL MEDIA POST

Following are an email, a cover letter and a social media post you can use to present your ***Tax Planning Guide***. Note that, in the email and letter, the items in brackets can be inserted or left out as you like, and you can add other language or edit the existing wording to tailor these sample messages to your specific needs.

2020-2021 TAX PLANNING GUIDE COVER EMAIL

[Subject:] Do your tax strategies need a refresh?

Dear [Name]:

With individuals and businesses coping with the impact of the COVID-19 pandemic and some new tax laws going into effect, you probably have questions about tax planning this year. To save the most, you need to be familiar with the changes and how you may need to adjust your tax planning strategies.

This is exactly what our Tax Planning Guide [LINK to the page on your website where you feature your online tax guide] is designed to help you do. To view it, simply click on the link above to visit our website, where you can navigate to the guide and learn about important tax law changes and ways to minimize your income tax liability.

As you look through the guide, please note the strategies and tax law provisions that apply to your situation or that you would like to know more about. Then contact us with any questions you may have about these or other tax matters.

[As our client, you know that] (Or, for prospects) [At {Your Firm Name},] (Or, for referral sources and media contacts) [As you know,] our professionals are thoroughly familiar with the latest tax law developments and tax-reduction strategies, and are eager to help you take full advantage of them. So please send a reply email or call us today at [your phone number] to schedule a time to talk about ways to lighten your tax burden and better achieve your financial objectives.

Sincerely,

[Firm Name]

[Signature]
[Your name, title]

2020-2021 TAX PLANNING GUIDE COVER LETTER

[Date]

[Name, address]

Dear [Name]:

Do your tax planning strategies need a refresh? With individuals and businesses coping with the impact of the COVID-19 pandemic and some new tax laws going into effect, you probably have questions about tax planning this year. To save the most on your 2020 taxes, you need to be familiar with the changes and how you may need to adjust your tax planning strategies.

This is exactly what our Tax Planning Guide is designed to help you do. We hope you find this complimentary copy helpful in identifying steps you can take to reduce your personal and business tax liability. [You'll also find the guide on our website, ____________.com.]

As you look through the guide, please note the strategies and tax law provisions that apply to your situation or that you would like to know more about. Then contact us with any questions you may have about these or other tax matters.

[As our client, you know that] (Or, for prospects) [At {Your Firm Name},] (Or, for referral sources and media contacts) [As you know,] our professionals are thoroughly familiar with the latest tax law developments and tax-reduction strategies, and are eager to help you take full advantage of them. So please contact us today at [your phone number] or [email address] to schedule a time to talk about ways to lighten your tax burden and better achieve your financial objectives.

Sincerely,

[Signature]
[Your name, title]

2020-2021 TAX PLANNING GUIDE SOCIAL MEDIA POST

For Facebook or LinkedIn

Do your tax strategies need a refresh? With individuals and businesses coping with the impact of the COVID-19 pandemic and some new tax laws going into effect, you probably have questions about tax planning this year. To save the most on your 2020 taxes, you need to plan carefully and take advantage of all deductions, credits and other breaks that current tax law allows. This is exactly what our online tax planning guide can help you do. So, visit our website and look through the guide. Then contact us to talk about ways to lighten your tax burden and better achieve your financial objectives. [Include your website URL.]