

MARKETING STRATEGIES

Your success equals our success. EZ-Tax Online has developed a comprehensive marketing program to equip you with the knowledge and tools necessary to become successful in the income tax preparation business. The outline that follows is a compilation of strategies that have been tried and proven in the field. There are ideas here that will work for you.

The real estate industry is known for its cliché “Location, Location, Location.” In this business, we find our cliché to be **“Exposure, Exposure, Exposure.”** People must know what you are doing, that you can give them what they want, and that you are capable of doing just that.

Exposure through Verbal Communication

First of all, you must be excited about doing taxes and convey this enthusiasm to your customers. Begin now by answering the phone with the words “and Tax Service” in your usual greeting. Each time a customer comes into your office, tell them that you are now doing taxes and look forward to preparing theirs in January. Hand them an Interview Sheet (downloadable from the web) to complete for a head-start.

Remember, everybody you come in contact with is your potential customer. Talk to your family, talk to your clients, neighbors, delivery men, postman, everybody. Tell them you are now a tax professional and want to do their taxes.

The income tax preparation business is highly competitive. Those that are most successful have a competitive edge. They show confidence that is above and beyond. You have the competitive edge because you are prepared and do a better job at income tax preparation. Also, your company will deliver a quicker check to the customer.

A real edge you have over the competition is that, unlike all other tax offices, yours is open twelve months a year. Now, today, show your enthusiasm and assurance that you are the best tax service available.

Exposure through Printed Media

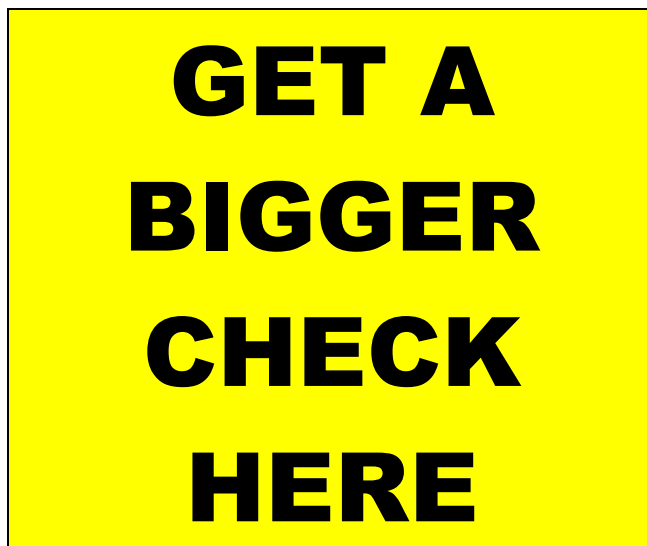
Visit the EZ-Tax Online website (www.ez-taxonline.com) for many examples of printed materials for use in your office. From the Marketing screen you can select either the “Flyers” or “Coupons” button to view sample advertising materials. Each of these has a window that allows you to customize the circular prior to printing.

Suggestions for distribution:

- Include a tax flyer in each letter or billing notice your office mails to customers
- Pass out coupons to every person who comes into your office
- Distribute flyers to apartment complexes for inclusion in their welcome packets
- Use the “WOW” coupon as part of the receipt for payment to your current traffic
- Take flyers to a major shopping center near your office. Place the flyer on the windshield of parked cars.

Exposure through Signs and Banners

Your windows should announce the tax service you offer. Vinyl lettering, banners and signs work well. The following models are proven success:



In addition to banners and signs, you can purchase inexpensive neon signs that simply state "TAX SERVICE". Several sites on the Internet offer these.

In late November, the bank that will be backing your refund loans will send each office a banner. As soon as these come in, post in your lobby.

Exposure through Partnering

Another useful tool found on the Marketing page of the website is Refer-a-Friend coupons. These are offered in \$5.00 and \$10.00 increments. Again, there is a box for you to type in your company's information prior to printing. You can distribute these to your current traffic, have the staff distribute in the community, or give three or more to customers when they are having their taxes done. Smile, and say, "Send me some business."

Churches have used the Refer-a-Friend program as a fund raiser.

Deliver flyers/coupons to day care centers for distribution to their parents. Businesses in town can include coupons in the W-2 envelopes. Flyers can be posted in employee lounges. Pass out flyers to Laundromats.

Knowledge and Confidence

With all the competition in the market, tax payers are becoming keenly aware of those tax professionals who are knowledgeable and who can accurately prepare their tax return. It is important that you make every effort to learn the basic tax knowledge included in our tax training and to become comfortable and familiar with the tax program.

EZ-Tax Online is staffed Monday through Fridays during regular office hours. Software and Tax training begins in October of each year. The Training portion of the web site has manuals, worksheets and other tools to help you get ready for the tax season to begin. We recommend you download both the Tax Training Manual and the Software Manual. After the teleconference training, you should begin doing the five practice returns. Repeat practice returns 1-3 several times before January in order to gain self-confidence.

Once you have mastered the five practice returns, take the Certification Test. From the EZ-Tax Online website, you can print your certificate, which you should hang in a prominent place on your office wall.

EZ-Tax Online has supplied you with the tools to succeed-Your Success equals Our Success.

Marketing Implementation

Your success equals our success. What are you doing to make this happen?

October Strategies:

- _____ Participated in training with EZ-TAX staff
- _____ Begin practice returns
- _____ Adding "TAX SERVICE" to your telephone greeting
- _____ Distributing coupons to each customer
- _____ Vinyl lettering announcing TAX SERVICE in window
- _____ Countertop advertisements available
- _____ Banners hung in strategic locations
- _____ Begin your partnering program
- _____ Plan aggressive media advertising for late December/early January

November Strategies

- _____ Expand the tactics implemented in October
- _____ Hang the bank banner in the lobby
- _____ Master practice returns
- _____ Complete the Certification Test on the EZ-Tax web site
- _____ Complete Chapter tests in the Tax Training Manual
- _____ Mount your Certificate in a prominent location

December Strategies

- _____ Rev-up the good talk you began in October, continued in November
- _____ Market your partnering program heavy
- _____ Prepare a mass mail-out that includes your complete data base
- _____ Include "TAX SERVICE" in your current radio/TV ad
- _____ Order additional office supplies in preparation for your tax season
- _____ Down load necessary Interview Sheets and worksheets from the Training portion of the web site

January Strategies

- _____ Your mail-out should be post-marked by the first week in January
- _____ Newspaper ads in the form of a flyer insert should go out by the 2nd week
- _____ Attach flyers on windshields in parking lots of major shopping centers in your area.
- _____ Talk up the Refer-a-Friend program