Chauncey Hutter, Jr's



DOUBLE Your Profit

BOOTCAMP

Sponsored By



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Real Tax Business Success

205 2nd Street S.W.

Charlottesville, VA 22902 Phone: (434) 293-2707 Fax: (888) 794-5712

Email: <u>chauncey@taxmarketing.com</u>

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SCHEDULE

Day 1

Introductions / Get Started 8:15am 8:30am The Tax Biz Wealth Assessment: How to FIX What's Holding YOU (Your Tax Business) Back and Enjoy Maximum Tax Season Impact Chauncey Hutter, Jr 10:15am Break The Most Effective Ways to Grow a Successful Tax Practice ... 10:30am Period! Chauncey Hutter, Jr 12:00 noon [Sponsored Lunch] How to Automate Your Tax Office for Peak Efficiency ... Guaranteed 1:15pm The Ultimate Tax Biz Success Roadmap -- PART 1 [Nov 28th-Dec 29th] Chauncey Hutter, Jr ONLINE Marketing Domination For Your Tax or Accounting 1:45pm Firm Nate Hagerty Break 3:15pm 3:30pm The Ultimate Tax Biz Success Roadmap – PART 2 [Jan 2nd] – Jan 27th] Chauncey Hutter, Jr 4:00pm Wealth Without Risk (Tax Lien Certificates & Tax Deeds) **Ted Thomas** 6:00pm Break for Evening (Informal Attendee Mastermind Meetings)

Day	2
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How to "Work LESS and Make MORE" During Tax Season 8:30am (For the OWNER) Chauncey Hutter, Jr Break 10:15am 10:30am Game-Changing Advanced Success Strategies for Tax Pros [including Case Study Tax Biz Success Stories] Chauncey Hutter, Jr 12:00 noon [Sponsored Lunch] How to (Finally) Achieve Your Tax Biz Goals and Lifetime Dreams The Ultimate Tax Biz Success Roadmap – PART 3 [Jan 30th] 1:15pm - Feb 24th] Chauncey Hutter, Jr 1:45pm 5 Secrets to a Million-Dollar Tax Resolution Practice Michael Rozbruch 3:15pm Break The Ultimate Tax Biz Success Roadmap - PART 4 [Feb 27th] 3:30pm -Mar 24th] Chauncey Hutter, Jr 4:00pm How to Master a Unique Niche to Explode Your Tax Practice with 5 New Income Streams Ron Caruthers 6:00pm Break for Evening (Informal Attendee Mastermind Meetings)

Day 3

8:30am The Most Important Numbers In Your Tax Business and

How to INCREASE Your Net Profit This Tax Season -

Guaranteed!

Chauncey Hutter, Jr

10:15am Break

10:30am How to Build YOUR Turn-Key Tax Business Money-Making

Machine Through Proven Leadership

Chauncey Hutter, Jr

11:30am The Ultimate Tax Biz Success Roadmap - PART 5 [Mar 27th -

<u>Apr 21st</u>]

Chauncey Hutter, Jr

12:00 noon [Closed-Door Lunch]

Chauncey's Private Coaching Clients Only

1:15pm REAL WORLD HOT SEATS!

3:15pm YOUR Tax Biz Success Simplified ...

Chauncey Hutter, Jr

3:30pm END

Tax Pro Success Stories From Other Bootcamp Attendees

"My business has grown from 225 tax returns to over 7,500 clients since the first time I heard Chauncey speak. All I can say is Chauncey's marketing techniques work as long as you follow them."

Mark Pricco, CPA

Your "Million Dollar Tax Course" helped me get 371 NEW clients this year! That one advertising tip you gave me increased my response dramatically in ALL of my ads! My tax office ran so much smoother this tax season even with the increased business.

Gary Burger, IN

"Chauncey ... one would need a PhD in marketing and 20 years of successful marketing experience to pass up the opportunity to study your marketing material."

Gilbert E. Martinez, EA -- California

My tax business added 69 new clients this year using one simple idea you gave me to help stimulate referrals. The special promotion cost me \$790 and I received \$2,580 back in net profit. (That's over a 3 to 1 profit to advertising ratio) In addition, I expect to generate an estimated \$4,000 more in sales just next tax season alone. Thanks for the marketing tip that is helping me build my tax business.

Gerald Clancey, OH

You helped me increase my business by 50% in one tax season! I WAS SWAMPED! (I'm opening another location next tax season for sure.) I followed your referral program just like you said. It was HOT! One lady referred 76 new paying customers to me all by herself! Your membership course is simple and down to earth and easy to use. I've got all the answers right there in front of me. It's well worth the money I paid! I even have a master's degree and your Million Dollar Tax Course has helped the most ... I can't believe it! Thanks. I look forward to meeting more tax business owners in the membership group.

Carlos Gutierrez, CA

"I must say that I was more than just a little skeptical about attending your live event Thank goodness I (ordered) your materials. They were like a transfusion, charging me with optimism and excitement. Your package is revolutionary; profound in its simplicity. For the first time since I started (my) small business a few years back, I look forward with gusto to developing the business."

Sarah Cerda, TX

Chauncey's Bootcamp to Coaching Success Story

As a single mom, I have always needed to work two jobs. I had a full time job and I started a cleaning business to work in the evenings and weekends. I had a local tax person prepare my tax return for two years. Even though I had my cleaning business and I owned a home, the tax preparer said I didn't have enough deductions. This just didn't seem right, so I decided to take an H&R Block tax course. My main goal was to find out as much information as I could about deductions and credits to help me on my taxes. I didn't pass with A's but I did get the concept. Somehow I knew that there are others out there like me and I wanted to help them.

So I picked up my daughter and we moved to Phoenix, AZ in a U-Haul. We had no money; we didn't even have a vehicle. We stayed with my sister and her family for a season while I started setting up my new business. The first year in the tax business I did 400 tax returns.

I was introduced to Chauncey Hutter during my 3rd tax season. I purchased some of his marketing material and attended his boot camp. Both gave me assistance and insight into building my business. That year we did 1,250 returns.

The year we purchased the coaching program, the fourth year, we went to three offices and filed over 2,500 returns for our clients. By the fifth year tax season, we were teaching our own tax school from the material received in the coaching program and we built our business to five offices. I contribute the growth and success of my tax business to Chauncey's Coaching program. Now I have the formula to create as many offices as I would like to have and run.

Cindy Dillard, AZ

The Tax Business Wealth Assessment:

How to FIX What's Holding YOU
(Your Tax Business) Back
and
Enjoy Maximum Tax Season Impact!

IMPORTANT

Fill Out 133 Point Wealth Assessment
BEFORE This Session Begins

MINDSET

 	

ENERGY/WELL BEING

PHYSICAL ENVIRONMENT

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MARKETING & SALES BASICS

POSITIONING

ADVERTISING

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JOINT VENTURE & REFERRALS

CLIENT SERVICE COMMUNICATION RETENTION

RELATIONSHIPS TEAMWORK COMMUNICATION DELEGATION

RECRUITING INTERVIEWING HIRING

EXTREMEPRODUCTIVITY

MONEY / INCOME CASH FLOW WEALTH CREATION

DAILY OPERATIONS SYSTEMS & TECHNOLOGY

Top 10 "Holes" In Your Tax Business YOUR PRIORITY LIST

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NOTES

The Most Effective Ways to Grow a Successful Tax Practice ... Period!

START BY...

Pick Battles You Can Win

Classic Examples

- · The "100 Hour" War
- · Rapid Refund Speed
- Target Latino Clientele

#1 Internal Analysis

- Compile Clients Into Groups
 A ... B ... C ... or D (best to worst)
- · 80 / 20 evaluation (profit margin & time)
- · Restructure (Increase) Pricing of Services

#2

Answer The "Who Cares?"Question

- What does your "A Client" REALLY Want? (How can you give it to them?)
- Structure an Irresistible Offer (Unique Selling Proposition)
- Where are your "A Client" Prospects?
 (How can you communicate with them affordably?)

#3

Leverage Existing Relationship Assets

- Build a Referral Culture (employees AND clients)
- Your 'Top 10 Referral Paths' for new clients (emphasize list as part of your training)
- Parasite Marketing (gain access to RESPONSIVE like-minded prospects)

#4

Focus on High Payoff Processes

- Salesmanship Inside Your Office (front / middle / back)
- External Marketing Schedule (Market / Message / Media / Timing)
- TRACK -- Know Your Numbers! (Find Your 'Baseline' ... Set Measurable Goals)

#5 Self-Governance (OWNER)

- Execution is EVERYTHING
 Not Just 'The What' [5%] But 'The HOW'
 [95%]
- Time Block Priorities
 (Focus Attention on Top 20% ... Delegate 80%)
- Build a Team (start with KEY 'Right Hand Shield' employee)

CASE STUDY

3 Steps to Doubling Your Tax Business' PROFIT

<u>Step #1</u>

You will make more money in 90 days focusing on your existing clients than you can in a full year advertising for new clients!

Step #2

You can increase your new client referrals by 300% and never have to personally sell anybody anything!

Step #3

You only need two productive hours per day to be a successful tax business owner!

STEP #1

You will make more money in 90 days focusing on your existing clients than you can in a full year advertising for new clients

*The "Acres of Diamonds" Principle

External Advertising Scenario

500 Tax Clients

\$250 per tax return

Goal = 100 new clients

Advertising Costs = \$15K to \$30K (depending on media, other factors)

For This Example: \$25K costs = \$25K new sales

BREAKEVEN is good ...

New Clients (for FREE!)

Internal Services Scenario

500 Tax Clients

- Implement three price increase strategies
 - Average \$50 extra NET per client
- Add upsell service 80% of clients won't say "no" to
 - Average \$100 extra NET per client
- Offer high priced service to 5 qualifying clients
 - Average \$4,000 extra NET per client

500 Client -- CASE STUDY EXAMPLE

500 x \$50 more per client = \$25,000

400 (80% of 500) x \$100 more per client = \$40,000

5 (qualified clients) x \$4,000 per client = \$20,000

Total NET \$85,000

(minus \$5K for misc. expenses)

\$80K Bottom Line Profit

Compare:

EXTERNAL

Target New Tax Clients Over 12 Months

BREAK EVEN + / -

INTERNAL

Attention on Services to Existing Clients in 90 Days \$80,000

Note: You Don't Have To Pick One ... But Rather You Implement BOTH

Step #2

You can increase your new client referrals by 300% and never have to personally sell anybody anything!

*All Tax Business Owners get referrals ... you are supposed to since we're in a SERVICE profession.

THE KEY IS A SYSTEM SO YOU CAN SCALE WITHOUT THE OWNER SELLING OR DOING ANY ADDITIONAL MANUAL LABOR

3 Reasons Why You Shouldn't Try And Sell Anybody To Do Anything (Especially Referrals)

- #1 BAD POSITIONING for Tax Expert

 #2 You DON'T LIKE "Tooting Your Own Horn"
- #3 Most Tax Pros Are REALLY BAD at Selling

Then HOW Can You TRIPLE Your Referrals?

Hire a Part-Time 'Referral Coordinator' • EASIEST Position You'll Ever Fill

Hand Pick a Short List of Mavens

 Usually You Already Know Them (or someone introduces you)

"Wine & Dine" Your Champion Clients

 Offer Special Access (so they feel like they are on your team)

Why Do These Strategies Work So Well For Increasing Referrals?

- 3rd Party Endorsement MUCH More Effective
- Leverages Proven "Word Of Mouth" Referral Resource
- Your Singular Focused Coordinator Keeps Communication Alive (Weekly)

Bottom Line:

You're empowering other people to do something they're already good at and your consistent accountability to a System gets your tax business much better results!

Step #3

You only need two productive hours per day to be a successful tax business owner!

If I recorded how you spent your time working at your office during a typical ...

- Month
- Week
- Day

Would I be able to "find" your most productive HOURS working in your tax business?

99% Of All Tax Professionals Have Bought Into The LONG HOURS LIE That The Owner Must Go Into Work Early And Stay Late During Tax Season

Is This You?

- Most, If Not All The Office Work Flow Must Go Through You
- No Time To Grow The Practice Because Too Involved In Day-to-Day Ops
- You Communicate With All Clients About The Same (Besides The Time Involved Providing Your Service)

Power of The 80 / 20 Principle

You Already LIVE The 80/20 Rule
But Only 1% Of Tax Pros Purposefully Use This
Principle For Their Benefit

- Your Personal Productivity Patterns
- Enhancing What You Do Well ... Transferring Off Your Plate What You Don't
- Laser Focus On Highest Profit Activities

What If You Only Worked 20% Of Your Normal Schedule, But Increased Your Personal Take-Home Income By 80% ...?

Think About HOW Your Life Would Change For The Better If ...

- Just having an Extra-Large Buffer of Cash in your bank account
- Giving yourself options (grow a little or expand a lot)
- Being home when others have to go to work (even during tax season!)
- Having a lucrative exit plan in 5 years
- Letting yourself live your dreams

(have the freedom to do whatever, whenever)

You Will DOUBLE YOUR PROFIT AND CUT YOUR WORK HOURS IN HALF

By Following ...

Step #1

Making more money in 90 days focusing on your existing clients than a full year advertising for new clients!

Step #2

Increasing your new client referrals by 300% and <u>never</u> personally selling anybody anything!

Step #3

Only working two (productive) hours per day in your office, running a successful tax business!

Let Me Ask You A Question?

Are you satisfied with the results you're getting from your tax business now?

Sales?

Systems?

Staff?

Are You Happy With

YOUR Current Workload

The Number of Hours YOU Spend in the Office

Your Ability to FIND & Hire Quality Employees

How About Your ... NET PROFIT

Want More?

That's why You are here!

(School Is Never Out ... Even For The Pro)



How to Automate Your Tax Office for Peak Efficiency ... Guaranteed

by Mark Pricco

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ONLINE

Marketing Domination For Your Tax or Accounting Firm

by Nate Hagerty

	
	

How to "Work LESS and Make MORE" During Tax Season

(For the OWNER)

Your Goal As THE OWNER:

Work **IN** Your Tax Business 20% Of The Time

Work **ON** Your Tax Business 80% Of The Time

Examples:

Working IN Your Biz

- Preparing tax returns
- Bookkeeping / Payroll
- Servicing Clients (manual labor)

Working **ON** Your Biz

- · Preparing marketing schedule
- Developing advertising messages
- Recruit / Hire / Train Employees (replace your workload)

CASE STUDY

Tax Business Owner GOALS

3 Goals In 3 Years

Goal #1

Net Additional \$100,000 During Tax Season By 4/30/___

Goal #2

Work No More Than 2-4 Hours Per Day In My Office By 4/30/___

Goal #3

Start Companion Company Inside Tax Office Netting More Profit Than Your Current Tax Business By 4/30/__

Net Additional \$100,000 During Tax Season

3 Steps to Achieve Goal #1

- Restructure Your Fees (increase margins)
 - o Raise prices on most commonly used Forms & Schedules
 - o Double Fees on selected "low margin" Forms
 - Stop offering certain services (hassle factor)
- Start Year-Round Membership (bundle prices)
 - Audit Protection Service added to ALL tax returns
 - Compile "free" services you currently provide attach value
 - Begin using monthly auto charge vendor (credit card / bank account)
- Target New Marketing Campaign For "Responsive" Niches
 - o Use existing tax clients (in same niche) testimonials
 - Feature champion client's story in featured Advertorial
 - Set up joint venture campaigns with organizations they associate

Work No More Than 2-4 Hours Per Day In My Office

3 Steps to Achieve Goal #2

Promote / Hire "Right Hand" Manager

- Start within first
- Birds-of-a-feather strategy (w/ best employees)
- Trial period (one tax season)

Start 30 Day Training Intensive (all employees)

- Define EACH office job responsibilities (in writing)
- Evaluate EACH employee (DISC Test) for best FIT
- Video EACH position (2 or 3 minutes) include specific detailed notes

Split Delegation 50% In-House / 50% Outsourced

- o Personal preference and/or Owner's comfort level
- Cost / Access / Serving the Client
- Restructure Client Communication HOW & WHEN

<u>Question(s)</u>:

What if you were forced (at gun point) to only work 2 hours per day in your tax office. How would you structure your time? What would you do in those 2 hours?

Start Companion Company Inside Tax Office Netting More Profit Than Your Current Tax Business

3 Steps to Achieve Goal #3

Survey Existing Clients On What Additional Services They Want

- Face-to-face while filing taxes during tax season
- Review client files over the summer
- End-of-the-Year Phone Interviews

Contact Local (Or National) Like-Minded Financial Service Companies Wanting To Work With Tax Pros

- o Investment & Insurance Biz
- o College Planning / Funding Biz
- Tax Lien & Tax Deed Opportunity Biz

Hire Manager (w/ Sales Focus) To Run This Operation

- YOU must oversee, not get too involved in day-to-day
- Leverage client list first, then follow parasite strategy
- Prepare Plan for Best Time To Promote (go fishin' when bitin')

Work On (At Least) 1 Step **EVERYDAY**

MAKE SURE YOU'RE
"MOVING THE BALL DOWN THE FIELD"

DAILY
GETTING YOU CLOSER AND CLOSER TO YOUR
GOALS

WARNING:

This will cause a "problem" ... will force you to resolve

All of the "other stuff" you normally do in your day

MUST GET KNOCKED OFF YOUR TO-DO LIST

These items were either not that important anyway

OR

You need to find someone else to DO them

FACT:

Most tax business owners do NOT consistently work on the **most important goals** for their life / business on a regular basis [daily to-do lists]

List ALL of Your Current Projects AND List Everything Your Business Must Complete Each Month

Which Items on the List are **YOU Responsible for DOING?**

80% of Your Projects / To-Do Lists Each Week / Month MUST BE DELEGATED / OUTSOURCED

"But what about all that <u>STUFF</u> I'm in charge of?"

"What will people think of me if I stop doing

YOU MUST CENTER YOUR DAILY ACTIVITIES AROUND <u>YOUR 20</u>%

THE POWER OF SAYING "NO"

*what do I cross off my list

*what can I delegate

*what services do I STOP offering [you make very little money on them anyway]

FEAR of Delegation OR AFRAID of Outsourcing

QUESTIONS FOR: <u>Perfectionist or Owner With "Control"</u> <u>Personality</u>

- How many achievements do I resist because I assume
 - I have to do / figure out everything myself? [being the center of the project]
- What do you believe that only you are capable of doing? [just look at all the tasks you do on a regular basis]

Delegate vs. Dumping

Bad experience?
Previous Disaster?
Perceived Problems?

The Circle of Commitment

- #1 Request
- #2 Negotiate (agreement)
- #3 Performance
- #4 Acceptance

WHAT IF I WAS FORCED TO ONLY WORK 2 HOURS A DAY?

(Ment	tally, Go There What	Would You Do T Days)	o Prepare Starting In 10
	How would y daily / weekly / n	_	
	(Be Proactive	'Force Yo	urself')
	Don't Wait Un	til	

Work Smarter, Not Harder The 80/20 Principle

Greatest Impact Zones In Your Tax Business

Link Results Inside Your Tax Office's Highest Impact Zones With Your Overall Goals

Reception Area

- Phone Sales
- o Face-to-Face Greeting
- o Initial (Positive) Word of Mouth

Tax Preparation Desk

- Properly Charged Fees
- Upsells / Additional Services
- Empathy

Return Review (back office)

- o Guaranteed Accurate Return
- Accountability
- Follow Up Referral System

FOR BEST RESULTS, FOCUS ON THESE TWO THINGS:

Your People

Your Process

As you move forward in Updating Your Tax Office's Operational Flow ...

MAKE SURE:

Whatever You're Planning To-Do Differently In Your Tax Office,

WILL THIS CHANGE

Help or Hurt the Sale?

Increase or Reduce Owner's Stress Level?

Invest in a "Human Shield"

Leverage: YOU

You (the owner) Are Your Most Important Asset In Your Tax Business

Properly Set Up, Your Business Can Achieve Very Successful Results

With YOU Working Less and Making More

IT'S UP TO YOU TO CHOOSE THIS PATH

I did it ...

Others do it all the time ...

Now it's your turn!

	-
 	-
	-
	-
	-

Game-Changing Advanced Success Strategies for Tax Pros

GAME CHANGER #1

Don't "Sell" ... Prescribe Solution

Positioning / Expert

- Marketing Material
- Incoming Phone Calls
- Access (in person / email)

Never Offer ONLY Tax Prep

- Tax Services (Commodity)
- o Answer "What's Next" Question
- o Add a "Tail" to All Services Offered

Enjoy Higher Margins

- Attract Better Quality Clients
- Recruit / Hire More Qualified Employees
- Gives You More Promotional Options

GAME CHANGER #2

Multi-Step Marketing Campaigns

Do more than "one-and-done" ads

- Multiple Increases Response Over Single
- Requires Increased Clarity on Target Client
- o Gain "Under-the-Surface" Clients (loyal)

Link Steps in Marketing Message

- o Sales Letter / Post Card / Emails
- Refer to Previous Step (debt collector model)
- o 3 Step Sequence (50% ... 10% ... 40% before DEADLINE)

Use Mixed Media & Varied Follow Up

- Direct Mail > Website > Email
- o Email (2) > Post Card > Phone Call
- Post Card > Phone Call > Email (2)

GAME CHANGER #3

Have Purpose & Plan BEFORE Answering Phone

In-Bound Call Strategy

- WHO answers the phone
- What's the GOAL (per phone call)
 - Existing Client
 - New Prospect
- Tracking / Measurement

Selling Tools Ready

- Phone Script (role play)
- o "Cheat Sheet" Notes
- o Systemize Follow Up

Don't Answer Prospect's Questions Over The Phone

- Answer their questions by asking questions
- o Qualify ... "Tire Kicker" or Good Prospect
- $_{\circ}\;$ Set office appointment or follow up with phone closer

GAME CHANGER #4

Offer "Under-the-Radar" Promotions With Other Businesses / Organizations

Compile a "Hit List" to Contact

- Similar clients or types of people as your tax biz
- Location(s) in close proximity to your office
- Your existing clients already "inside" other group

Introduce Yourself in a Unique Way

- Mail a "Gift"
- Drop off large clear plastic bowl of chocolate (refill)
- Send a personal messenger (w/ letter)

Follow Up w/ Deadline

- o Phone Call or Skype
- Meet @ "My Place or Yours"
- Lunch (tell'em it's on you)

GAME CHANGER #5

Re-Engineer Sales Process

Pre-Service Questionnaire / Survey

- o Find "Hot Buttons"
- Set Up Prescription Sale
- Sprinkle In Testimonials

Application (confirm good client match)

- Expert Positioning
- o Assumption Selling
- "Take Away" Offer

Diagnose Problem(s) – You Are Solution

- o Problem, Agitate, Solve Formula
- o "Preponderance of Proof" [Success Stories Book]
- o Confidence / Belief in your HIGH price

GAME CHANGER #6

Enter Conversation Already In Taxpayer's Mind

Whatever Lead Topic in the News

- o TRUMP
- OBAMACARE
- TAX LAW CHANGES

Show Empathy – Front End Advertising

- o How does he/she know that about me?
- Paint picture of their situation
- Show them they are not alone

Use "Fear & Greed" Emotions to Boost Response

- The 2 most powerful words in the tax industry
- o Fear of the IRS built into taxpayers' psyche
- o Desire for More Money can't miss benefit

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GAME CHANGER #7

THE MATH - Use Facts When Make Decisions

Cost to Acquire a New Client

- Average different media together (total cost avg.)
- 'Free' clients Breakeven
- Compare cost of buying existing tax practice

Cost to KEEP an Existing Client (Your Investment Annually?)

- Weekly / Monthly Communication
- o Offline / Online Media
- o Group / In Person

Lifetime Value of Client (Avg. 5 Years)

- o When is your biggest client drop out spike?
- o What can you do to increase your STICK rate?
- Systemize your LOST client campaign (3 years)

Real World ... Real Results

Tax Business Success

Consulting



ASK ABOUT CHAUNCEY HUTTER, JR'S ...

VIP 1-on-1 Coaching And Consulting Services

Application

Final Opportunity To Get Direct Coaching From Chauncey Personally

(VIP Program Ends April 2017)

Success Stories From Coaching Clients...

MAKING MORE MONEY ... WORKING LESS!

We have gone from a one person shop (me) and doing about \$10,000 in gross revenues to doing over \$200,000.00 in gross revenues and 20 employees this year with 3 offices around town. We have achieved so many goals since being in coaching that we could write a book about it, but my goal this past tax season was to work less and still make more money. Well, we did it.

Tony Mauro, IA

56% Increase In Bottom Line Profit

My company did a total of 1120 returns (that's up from under 300 when I first started with Chauncey). My goal was to do 1400 the following year. Not only did we exceed that goal, but we did a total of 1526 returns, and my company grew an outstanding 36.25%. Another goal I set, obviously, was profit. And I'm please to share, my company grew our bottom line net by 56%. Wow! Need I say more? ... Now, I feel pretty **GREAT** about my business. Flat out, I recommend you hire Chauncey Hutter as your coach, too!

Michael Gray, MS

Explosive Growth!

We did it. Went from 150 to 776 clients in one tax season. I could not have done this without your information. I went from a 200 sq/ft office with one part time helper to a 900 sq/ft office next to a Wal-Mart with 7 part time helpers.

I got 67 referrals and using one of your postcard ads brought in about 70% of my business. I am looking at doing well over 1,000 taxes next year continuing using your information and what I learned this year. Thanks!

P.S. I did take 3 days off during spring break. Setting up your office the way you explain does work!

NEXT YEAR...

"Well, it's March 26th... bottom line: by listening to Chauncey's advice I made an extra \$143,750.50 so far this year. As usual, Chauncey's advice and experience has paid off big for me again."

James Erickson, MO

Mistakes Made And Still Added An Extra 6 Figures To My Bank Account!

I made a lot of mistakes this year, however I am pleased with the overall results. Our client's fees increased by over 55% while our individual return count only fell by 12%. This means that we made a lot more money with less work, which was my goal this tax season. I would never have made this jump if it wasn't for Chauncey. I was able to put an additional \$50,000.00 in the bank to use for whatever I want and an additional \$50,000.00 in our operating account.

Tom Jeffers, IN

The Most Important "Numbers" In Your Tax **Business** and **How to INCREASE Your Net Profit** This Tax Season ...Guaranteed!

IMPORTANT "NUMBERS" FOR YOUR TAX BIZ

Number of Existing Clients		
Last Year % (Increase / Decrease)		
% of Clients Returning (Retention)		
% of Clients Referring (Trackable)		
Avg. Cost to Acquire New Client		
Avg. Dollar Per Return		
% of Payroll to Gross Sales		

Avg. Time for Completed Return

% of **Production Work** (by Owner)

WHATEVER NUMBERS YOU DON'T KNOW,
FIND OUT ACTUAL FIGURES &
PERCENTAGES BEFORE TAX SEASON
... THEN GET A BASELINE

Tax Industry "Best Practice"
Numbers Vary
Depending On Several Factors

Examples:

Owner Operator vs.
Manager

High Volume Tax Prep vs. Lower Volume Financial Services

Tax Services – Front End 'Bait' Used To Quality Prospects (Core Business Really Selling High Margin Financial Services

MAKING MORE PROFIT IN YOUR TAX BUSINESS

Higher Margins More Important Than Volume

Be Higher In Price Verse Your Competition

Most Struggling Tax Practices Are Broke Because Of Low Prices

All Normal Costs Of Doing Business Are Going Up (Less Margin)

Never Follow Low Price Competitors And Foolishly Cut Your Fees

Best Way To Improve Your Profit Margin Is Increase Your Price

Your Prices Won't Increase Unless You Charge Your Client Higher Fees

Tax Pros Who Don't Know How To Promote Their Services Think Cutting The Price Is The Best Way to Sell Something

Cutting Your Price Is A Self-Inflicted Wound

Failure To Raise Your Prices Is ALSO A Self-Inflicted Wound

"We've Found The Enemy ... And He Is Us"

If Talking About Higher Fees Makes You Feel Uneasy (Get Over It!)

What's Scares You The Most About Increasing Your Price?

Your Client Must BELIEVE You Feel Good About Your Fees

Can You Say Your Price Credibly, Comfortably & Confidently?

Know WHY You Are Higher In Price Than Your Main Competition And Be Able To Explain -- Quickly & Easily

Your Price Might Be Higher Than Your Competition, But That Doesn't Mean Your Price Is High

Price Has Nothing To Do With Cost (Especially In Service Biz)

Overcoming Price Objections With: "So" ... "And"... "Yes"

Very Few People ACTUALLY Buy On Price (But They Say They Do)

The Most Expensive Client You'll Ever Sell Is a Price Buyer

If You Say "Yes" To A LOW PRICE Buyer ...

- They take up all your time
- They do all of the complaining

- They are more likely to give you payment problems
- They tell everyone else how little they paid
- They drive off your good clients
- They are less likely to come back (not loyal)

Premium Pricing Makes A Statement

"Lowest Price In Town" Makes A Statement, Too

Example: \$50,000 Rolls Royce

Why Wouldn't You Pick The Lowest Priced Brain Surgeon?

!

When's The Last Time You Bought The Cheapest Tires In The Store For Your New Car?

Premium Price Testimonials: Let Your Best Clients Help You

At The End Of The Day, The Biggest Problem You'll Ever Have To Selling Your Tax Services At Higher Prices Is **BETWEEN YOUR EARS**

Practice In Front Of A Mirror

Just Do It

And I Guarantee Your Tax Business
Will Enjoy The Benefits Of

Maximum Profit!

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How to Build YOUR Turn-Key Tax Business Money-Making Machine Through Proven

Leadership

The Most Successful Tax Business <u>OWNERS</u>

As Leader

 Hold others Accountable to what's Important in Your Tax Biz

As Manager

"You Get Things Done Through Others"

The Consultant's Consultant

Somers White

(How to LEAD in the Real World)

Efficient Leadership

The power of simplicity

The power of <u>clarity</u>

The power of <u>asking questions</u> (and then <u>listening</u>)

The power of time

HOW TO:

Increase Employee "Buy In" Motivation & Attitude Plus Improve Execution Of Your Tax Business' Success Plan

The 3 BEST	
The 3 WORST	
3 <u>CHANGES</u> Why?	
HOW <i>You</i> Would Do It.	

HOW TO MEET WITH YOUR EMPLOYEES

Format:		
To:	(who is invited / attending mee	ting)
From:	(who is calling / leading the me	eting)
Meeting Date / Time	e:	
Purpose / Reason 7	Го Meet:	
Main Topics To Be	Discussed:	(3 max)
Instructions in Body	of Email	
For Each Topic, Se BEFORE Meeting S	nd Your Written Feedback 24 H Start Time	ours
Include For EACH	Topic:	
3 Good Things		
3 Bad Things		
3 Changes You'd L	ike To See Made – and Why?	
(if changes, list spe	cifics on HOW best to execute)	

HOW TO LEAD YOUR MEETING

- · Compile all employee feedback into one document
- Divide into Good, Bad, Changes ... (names omitted)
- Review / Plan the direction of your meeting from info
- · Assign number of minutes to spend for each topic
- Hand out feedback document 5 minutes before meeting
- Walk your team through each topic / ask for clarifications
- Make decisions
- Define what a successful outcome looks like
- Assign person responsible for project & deadline
- · Make action list to complete project
- Confirm resources available to move forward now
- End meeting on time

Let Your Employees Bring You The Solutions To Your Tax Business' Problems

Stop And TAKE the <u>TIME</u>

WRITING is key to solving

Defining Problem helps Clarify Solution

Tax Biz Owner to Employee

"Don't Bring A Problem To My Attention Unless You Have A Potential Solution To Help Solve It"

Issue:
Problem: (describe in more detail)
Solution:
Implementation Strategy: (Project List)
Accountability:
WHO
WHY –
WHAT –

HOW –			
WHEN			

Track Milestones To Reach Your Goals

Report Employee Productivity

- Individual Accountability
- Staff Competition (peer pressure)

What 5 Things Do You Want To Measure In Your Tax Office

Accountability Woven Into Daily Work Life

Time:

Be Strategic on how you spend it

- Your most <u>productive</u> time (day / week)
- Your best time slots to work on your priorities
- What IS the <u>BEST</u> use of your <u>time</u>

Activity is EASY to recognize (normal busyness of your office)

What does <u>Accomplishment</u> look like?

- Something that got done, period.
- Always described presently as past tense
- Immediately produces profit
- Can be measured or tracked as directly contributing to your stated goals

Activity vs. Accomplishment

IF YOU COULD DO NOTHING ELSE BUT CUT ACTIVITY DISGUISED AS ACCOMPLISHMENT BY 50% ...

YOUR PROFITS WOULD SKYROCKET AND YOU'D HAVE ALL THE TIME YOU NEEDED TO DO THE THINGS YOU SAY YOU WANT TO GET DONE IN YOUR BUSINESS

SECRET SAUCE FOR SUCCESS

- #1 Decide what you will get DONE today
- #2 Assign each project a SPECIFIC block of time
- #3 SCRIPT your day in 15 minute / hourly time blocks in priority order
- #4 Bar all distractions or interruptions until you are DONE

Simple ...

Hard To Follow ...

But, Worth It!

This Time Productivity Formula is LIFE

CHANGER!

Leaders Lead By Example

Once You Improve In These Areas Require Your Employees To Follow You

(if no one is following you, then you're not leading)

HOT SEATS

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	·

				
-	 			

YOUR Tax Biz Success Simplified...

Top 10 Tax Business ACTION STEPS **YOUR PRIORITY LIST**

1			
7			
10			

	<u> </u>
 	·

The Ultimate Tax Biz Success Roadmap PART 1

Week of:

Nov. 28th Recruiting

Dec. 5th Interviewing

Dec. 12th Hiring / Training

Dec. 19th Office Set Up (Operations)

Dec. 26th Equipment / Software

Hire The Right People

#1

Be Clear (In Writing) on Work You Want Completed

#2

Define Success ... What Does Quality Work Look Like? How Fast? etc (Benchmarks / Expectations)

#3

Develop Marketing Campaign for New Employee Just Like You Would for a New Client

#4

Sift / Sort / Screen ... Qualify Through "Hoop Jumping"

#5

Interview Candidate For Past BEHAVIOR (Relate to Current Job Description or Projects to be Completed)

#6

Validate your Top Candidates (let other people interview ... references, background checks etc)

#7

"Trial Hire" with basic training course to start and agreed upon performance review dates in near future

What are the NEEDS in business? (Make a list)	
As the owner, what (ne "taken off your plate" a (List your top 3)	
What will it "COST" if y the need OR fill the need	ou do not filled incorrectly?

List one or more <u>Specific Positions</u> your tax business NEEDS filled:				
pos	at's the PROFILE of each ition? ecific behaviors needed for success)			
#1	Tax Preparer [Entry Level or Experienced]			
#2	Customer Service / Support Staff			

What's Your UHP? (Unique <u>Hiring</u> Proposition)

Intangibles Do you have any unique opportunities? (describe)	
	_

The Top 5 Reasons Why A Person Says "Yes" To A New Job Offer

- 1) Be connected with a Winner
- Lifestyle / Flexibility
- 3) Growth Opportunities
- Believes in "mission" (purpose)
- 5) Financial Rewards

Based On What You've Said Is True:

The Needs In Your Tax Business And The Specific Positions Needing To Be Filled (That's Costing You Time & Money If Not Filled Properly) And The Behaviors Most Needed To Ensure Success

NOW ... You Can Go Find The Quality People Who Will Be The "Best Matched Employees" For Your Tax Business!

Successful Recruiting Really Is Lead Generation Marketing

How You Find A Perfectly Matched Client Is The Same Formula As Finding A Perfectly Matched Employee!

MARKET MESSAGE MEDIA

- Figure Out The Target (MARKET)
 - Find Out What They Want (MESSAGE)
- 3) Reach Them Affordability (MEDIA)

Once you know the WHO ... and WHAT they want, then work backwards and figure out how best to reach them!

Remember: They Are MANY Ways To Be Right When Marketing For Quality Employees

Chauncey's Top 5 Recruiting Strategies

- 1) Targeted Ads
- 2) Employee Referrals (plus get "top performer" testimonials)
- 3) Existing Clients
- 4) 3rd Party Endorsement (email blaster)
- 5) Unique Hiring Proposition Business Cards

Advanced Tip:

Before You Write A Help Wanted Ad, Don't Forget This ...

When a job seeker is looking for a place to work, he or she is thinking 3 things in their head as they read your ad.

- 1) Can I do this job?
- 2) Do I want this job?
- 3) Would I want to work for this business?

Wanted: Experienced Tax Preparer Wanting A Flexible Schedule

"Imagine Working For A Busy & Successful Tax Business That Allows You To Leave Work At 3pm During The Middle Of Tax Season!"

<u>Do YOU Enjoy</u>: Working as part of a team, helping taxpayers and resolving problems, learning new skills and being rewarded for results? If so, send a one page letter (no resume') telling us why you would make an excellent choice for our tax preparer position. Please include your computer skills, history in working with tax clients, and how you've been able to quickly pick up new skills in a fast paced tax office environment.

Email	FAX

For additional info about our tax business, call our 24 / 7 recorded voice mail message system hotline*. (xxx) xxx-xxxx

* *

*Note:

I recommend getting your best employees to record a few testimonials about the benefits of working for your tax firm. Plus, add several UHP (unique hiring propositions) onto the voice mail message ... then at the end of your message, give the email and fax info and repeat the "send one page only" instructions.

Tax Preparer Help Wanted!

Could you be the <u>experienced</u> tax preparer I'm seeking to work full-time during tax season and handle many of our Schedule C's and Corporation returns for me?

Busy tax business owner constantly buried with far too much tax preparation work needs a well organized, detail-oriented tax professional 35 to 45 hours a week in his <vour city> office.

During previous tax seasons, I've tried to "do it all" and end up working until 10:00pm at night during the week and many hours on most weekends ... BUT NOT ANYMORE!

I own a rapidly-growing professional tax business located in <your area>, where we've been for <# in years> years now.

Truth is, I'm stuck working late again getting ready for this tax season. (And I'm determined NOT to work crazy tax season hours again this year.) But today, I've just got too many things to do --- all the paperwork, invoices, faxes, new employee training and operational details that go with getting a tax office up and ready for tax season The growth of my business is killing me!

Can you help make my headaches vanish by handling some of the seasonal tax preparation workload?

Are you somebody who's got at least 4 years of tax preparation experience? Use to preparing 100 tax returns or more during tax season? If you're not already an EA or CPA, you have plans to do so?

Would you be described as a loyal, hardworking behind-the-scenes type person who could prepare drop off tax returns if asked, but feels comfortable meeting with my tax clients face to face sprinkled throughout the days as well? And so productive your last employer considered hiring two people to replace you after you left ... Plus you feel comfortable in a small tax office environment where priorities can change quickly ... (you've been through tax season before) ... So you're very good at handling multiple tasks, even following up with tax clients on the phone about their tax situation.

If so, we should talk because you just might be the experienced tax preparer I'm looking to hire for 35 to 45 hours a week (Mondays through Fridays during normal business hours). The pay is negotiable and our office dress code is business casual. You don't need a resume to apply, but you do need to tell me where you've worked recently and include references.

Think you might be the person I'm looking for? For more details, pick up the phone now and **call my 24-hour voice mail at (xxx) xxx-xxxx ext x** Hopefully with your help I'll be able to start leaving work at a descent hour and this tax season will run as smooth as ever without the long hours!

Voice Mail Script

Hi. My name is vour name. Thanks for calling about the experienced tax preparer position currently open and soon-to-be-filled in our tax business.

Like I said in my Help Wanted Ad, I'm looking for a detailed person who loves to help people who mainly file Schedule C's and Corporation returns. The overall tax return volume is too much for me to handle -- so to better serve our tax clients during tax season, I've got to get a quality tax preparer to help me.

If this job sounds like it's got your name on it, do me a favor. Take a moment and write me a one page letter telling my why you think you are a great fit for this tax preparer position and why you believe I'll be thrilled to hire you to help our office be more successful. Oh, and remember: one page only ... and please no resumes.

Email me ASAP to: <tax biz owner's email>

Or if you prefer to fax, the number is: < (777) 777-777>

Thank you for your interest. I'll be in touch.

That email address again is: <tax biz owner's email>

And the fax number is: <(777) 777-7777>

Thank you.

3rd Party Endorsement Email Recruiting Strategy

My "Cyber Recruiter Blaster" uses the power of the "Endorsed Mailing" from the Direct Response World, the ease and affordability of NO COST e-mailing from the Internet Marketing Community, and combines both successful techniques with the "birds of a feather flock together" philosophy your mother told you about when you were a kid.

You see, if you follow this same formula and get 2 or 3 people you respect and value their work habits, honesty, integrity and whatever else you are looking for in a new employee, and get them to send this E-mail to THEIR address lists ... you'll have a higher percentage of these kinds of people reading your friend's endorsement of you and you just sit back and watch your e-mail box fill up with quality people inquiring about your job opportunity!

The "Endorsed" e-mail: getting a quality person recommending you and your job opportunity will always work better than you saying how great you and your job opportunity is.

Plus, using e-mail enables you to test different ideas at NO COST, which is really nice since that means there's no risk for you to at least try this strategy.

The person looking for the kind of opportunity you are offering will <u>immediately</u> e-mail you back a note (many times with resume attached) expressing their interest for more info. The ones who DON'T sound good, you don't have to respond to (if you don't want to) and the ones you DO like, you can get appointments lined up with them in no time at all!

Let me give you the exact details of what to do:

On the "subject" line in the e-mail, write ...

If you know of anyone who's looking...send my friend a note

Then the e-mail can read:

A friend of mine your name> has this hugely successful tax
business and he's looking for an experienced tax preparer that loves
to do Schedule C's and Corporation returns and is really gifted at
helping clients feel at ease when dealing with the IRS. This person
doesn't need to be an Enrolled Agent or CPA, but achieving either of
these goals needs to be on their radar for the near future.

If you know of anyone who might be interested in this kind of opportunity, please forward this email on to them. They can respond directly to <first name> by e-mailing him at <your email>. (Heck, if I were in the market for a new job opportunity I'd jump on this in a heart beat.)

Anyway, hope you are doing well. Talk to you soon.

<Name of 3rd party endorser sending the email>

Final Interviewing & Hiring Tips:

Don't be emotional about this decision

Focus on the facts and achieving your hiring goals

Predict success based on previous BEHAVIOR

Define what success looks like

- what needs to be accomplished
- what needs to be learned (knowledge & skills for your office)

What are the <u>results</u> you are looking for in the first 15 days, 60 days, and 180 days?

Identify the <u>behavior(s)</u> necessary for success in YOUR tax office and find people who <u>behave that way!</u>

(past <u>behavior</u> predicts future <u>behavior</u> 9 out of 10 times)

E.A.R. Interview Questions

- E = Example (... then probe for more info)
- A = Action (Step Me Through ...)
- R = Result (how did it turn out)

Always look to **Quantify Behavior** through your interview questions

Remember

"The Most Reliable Predictor of Success is Past Behavior"

PAST BEHAVIOR PREDICTS FUTURE BEHAVIOR

NOTES

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The Ultimate Tax Biz Success Roadmap PART 2

Week of:

Jan. 2nd Marketing

Jan. 9th Advertising

Jan. 16th Salesmanship

Jan. 23rd Systems

Biggest & Fastest

TAX REFUND\$ Allowed By The IRS ... Guaranteed!

New Costly Obamacare Mistakes On Your Tax Return Could KILL YOUR TAX REFUND ... Or Worse – Make YOU PAY Uncle Sam When Filing Your Taxes Next Year!

Our Fast Tax Refund Team Can Help You Now! (xxx) xxx-xxxx

We know life is hard and the bills pile up this time of year. So if you need your money and you need it ASAP, call our Fast Tax Refund Specialists today.

We are located at	

www.YOURTAXBIZ.com

Add Strong Client Testimonial HERE

\$25 Off

Any Tax Service

Special Offer for New Tax Clients ... Deadline 2/15/___

More Refund Money, Less Stress Tax Filing ... Guaranteed!

"Enjoy The Biggest Refunds Allowed By Uncle Sam With Worry-Free IRS Audit Protection!"

My Promise to You:

"If all you want is a cheap "fly-by-night" tax preparer to help you file your taxes this year, I respectfully ask that you call someone else. When you use our "More Money Back In Your Pocket, 100% Accurate Tax Filing Process" you'll sleep like a baby knowing you've received the maximum amount from Uncle Sam with no fear of the IRS. This year's New Healthcare Tax Laws are more confusing than ever and IRS audits are increasing every month because of extra reporting for ObamaCare. Choosing [your name biz name], a professional tax practice with a guaranteed no-risk offer sets us apart from all the rest. Once we complete our work, if you're not happy with our tax services, we'll fix any issues for free. And if you are still not satisfied, we'll refund all of our fees, period." – (Tax Biz Owner's Name)

(Your Tax Biz Name) is a dedicated to making your tax and financial life easier with less worry and stress about figuring out the New Obamacare Regulations & the IRS Rules. Since (year in tax biz), (your tax biz) has professionally prepared over (number of tax clients returns added up each vear) putting millions of extra dollars in taxpayer's pockets just like you!

> Client Testimonial Here (inside border / boxed area)

Don't Gamble With Something As Important As Choosing The Right Tax Professional For You!

Your Tax Biz Contact Info

CALL FOR AN APPOINTMENT NOW (YYY) ZZZ-ZZZZ www.YOURTAXBIZ.com

Special Offer for New Tax Clients ... Deadline 2/28/

\$25 Off Any Tax Service

Stop The Insanity Now!



"Are you going crazy worrying about Uncle Sam?"

Guaranteed Peace Of Mind With IRS!

FREE Electronic Tax Filing & SAME Day Tax Preparation Services

Dear Middle Income Taxpayer,

All accountants, CPA's and tax preparers are NOT the same.

Most work with their head buried in paperwork, eyes blood red from long hours at the computer and then scramble through the mess when you call or inquire about their tax services. Do you like being treated like an after thought? Or do you appreciate being "talked down to" about all the confusing new tax laws? Maybe getting stuck with a ridiculously high tax bill makes you feel important each tax season!

Well, based on the regular middle income folks I talk to, you want a tax preparer that does NOT treat you like a number. You want an experienced tax professional to give you plain talking, easy-to-understand advice on how best to file your taxes (not some high priced CPA gobbly gook). You want your annual tax filing with the IRS to be as painless as possible. And of course, you do NOT want to send Uncle Sam any of your hard-earned money you aren't

supposed to. Most middle income taxpayers pay more than what is legally required for no reason except they didn't know any better. (You should NOT make this mistake this tax season!)

At <your tax biz>, we *specialize* in "Peace Of Mind Tax Filing For Middle Income Folks!" And this year, the tax code is uglier than ever! Congress and the IRS and all those other people who make it hard to file a regular tax return correctly have messed everything up again. More tax law changes. More forms to keep track of. More lines in the tax code that make your life harder when it comes to filing your taxes with Uncle Sam!

Will filing a regular ol' tax return ever get any easier? Probably not. (Well, definitely NOT this tax season!)

You see, not only will your tax biz> get you your tax refund money faster than anyone else
on the planet, but we back up everything we do with simple, straight forward, "cover-you-like-ablanket" guarantees! (Most other tax firms don't have the guts to put everything in writing and
stand behind all of their tax services like your tax biz> does!)

We <u>Guarantee</u> you the BIGGEST Refund ... we <u>Guarantee</u> you the FASTEST Refund ... we <u>Guarantee</u> you SAME Day tax preparation ... we <u>Guarantee</u> 24 Hour No-Wait Drop Off Service ... we <u>Guarantee</u> Tax Filing Accuracy ... and we even offer a "Never-Worry-About-The-IRS-Again" <u>Guarantee</u>!

[See the Guarantee Flier in our office for details.]

Bottom Line: < Your Tax Biz > Puts More Of Your Hard-Earned Money Back In Your Pocket ... AND Provides Fast And Efficient Service So You Know What's Going On And Your Time Is NOT Wasted ... And Most Importantly, Once You File With Us – You 'Never-Have-To- Worry-About-The-IRS-Again' ... Period!

Oh, and if you want to hear what other real people are saying about filing their taxes with <our tax biz >, see this:

Real People Sharing Their Real Stories About Filing Their Taxes ...

'I normally prepared my taxes by myself. This year a friend of mine referred me to I came in and the	_
vere very courteous, very helpful and they even got me money back that I didn't even know I could get back. I w	/as
really surprised. I was very pleased and I will definitely refer other people and I will be back. My preparer we	ent
over everything, step by step. If I had any questions, they did not hesitate to answer my questions and they show	ed
ne how to get the most money that I could possibly get back. They did a wonderful job. So good, that I've ev	en
signed up for the class to take to learn how to prepare taxes. And to me that is just awesome because I've never h	ad
anybody do that before!"	
Tammy Thompson	
has saved me lots of mental stress over the last four years. They found an extra	
\$1,171.00 on last year's return and called to advise me. I don't have to worry about the IRS	
anymore with's Accuracy Guarantee!"	
Rebecca Dempsey	

"For the first time in my life <u>I was faced with an IRS audit</u> . Thank goodness prepared my taxes and were very helpful in helping me understand the paper audit process.' The manager explained everything and I was able to settle the audit quickly and get my money." Rachel Kolb
"I'm a single father with two children. I have custody of my kids and the preparer helped me get ALL the money back from the IRS I was supposed to. I was treated very fairly and friendly and I appreciate the staff very, very much. Thank you." Jeffrey Walker
"What I like best about filing my taxes with is they were kind, courteous and efficient. They explained everything great. This is my 6 th year I have filed with and I plan to do it again. Thank you." Rebecca Whitt
helped me because I was having trouble figuring out whether my ex had claimed my youngest daughter on his taxes and he would have done so illegally. And they did everything they could to help make sure that I got the most money back that I was supposed to get. They helped me figure out what I was supposed to do if he had claimed her and I wanted to contest it. They checked several different ways to make sure that I was benefiting and not going to be penalized in any kind of way. I can honestly say that got me the biggest refund and went the extra mile in doing so! Thank you." Michelle Nelson
"I have been a customer since 20 I came in here expecting to owe. The preparer who helped me very knowledgeable. The receptionist was also very knowledgeable and made the experience, of which I only waited just a few minutes, extremely nice. And not only did I not owe, but I got money back and filing my taxes was actually a pretty cool experience. I will be back next year. I wouldn't go anywhere else!" David Brown
"I always come to to get my taxes done. My tax preparer makes sure I get the most money because she checks all of my deductibles to make sure I'm getting what I am due. I recommend to my family and friends and I always feel confident that my taxes are done accurately." Emma Payne
"I've been doing my taxes at for 5 years and I've always been treated with respect. The staff is very courteous and knowledgeable so I don't have to worry about the IRS. I'll definitely be back again this year!" Steve Windsor

"I just came in to to file my taxes. It was the <u>best refund I've ever gotten</u> . I want to thank you all so much. The woman that prepared this for me was like the best person I'd ever want to meet. She was nice, kind, explained everything to the tee and I really appreciate you all helping me. Thank you." Randolph Piper
"I'm a senior and my preparer was very kind and courteous and he did many things to help me. He encouraged me to fill out a correct form, which I appreciated. And he was helpful otherwise I could not have made the progress that I did. And I want to let you know that I deeply appreciate him and your kindness and just for the service that was rendered to me. And thank you very kindly." Hazel Brown
"A lot of people put off filing their taxes to the last minute because it's such a hassle made it HASSLE-FREE and EASY for me to take care of filing my taxes to the IRS. I have been a customer in the past year and I will continue to be one. Thank you very much." Karen Hensler

FREE \$30.00 DISCOUNT Off Any Tax Service!

See the special coupon offer for you at the bottom of this page? That's yours! Grab it and take it with you when go to <your tax biz >. I'm happy to extend you this Courtesy Discount because we want YOU to join our <your tax biz > family of satisfied tax clients. And we know, once you let us help you file your taxes this year, you'll be a customer for life!

[NOTE: Make sure you don't wait and come in our tax office past the March 1st deadline.]
YOU DON'T WANT TO MISS OUT ON AN EXTRA \$30.00 BUCKS!

By the way, <u>NO APPOINTMENT IS NEEDED</u>. Just make sure you bring all of your relevant tax info with you. For a detailed list of what you might need to bring (this will depend on your current tax situation), go to www.yourtaxbiz.com. And if you have a quick tax question you'd like answered, we offer a one-time only **FREE Tax Advice** section on our website, too. Go check it out if you want.

Anyway, we look forward to seeing you in our tax office soon. And remember, don't be discouraged by the tax filing requirements the IRS puts on you ... let us take that burden right off your back!

Sincerely, your name here

P.S. <u>FREE Early-Bird Bonus just for you!</u> If you hurry, (we'll probably only have enough of these Free Gifts for a few more days), you'll have your choice of a cool <u>25 Piece Tool Kit w/ flashlight</u> or <u>Genuine Freshwater Pearls with Satin Pouch</u>. [First come, first serve – for early filing clients only.]

"I <u>HATE</u> The IRS!"

Could Someone PLEASE HELP ME File My Taxes And Related Healthcare Forms?

... the right way without all the hassles and headaches ... make sure I'm getting the most refund money back from Uncle Sam as possible ... and could you back up your work with a Complete ObamaCare IRS Worry-Free Accuracy Guarantee? I have called other so called tax pros and they don't seem to know anything about the healthcare side of filing my taxes. I'm happy to pay a fair price just to get this burdensome monkey off my back ... so really, I just want to give everything to a Tax Professional who knows what they are doing and can help me ASAP... Am I living in "dreamville" or could this really happen for me in the next couple of days?

The Answer is YES!

(We can help you but you must call our office immediately!)

We Love Helping Regular Hard-Working People Deal With The New Healthcare Laws And Filing Their Taxes With Complete Peace Of Mind!

We have a limited number of Experienced Tax Pros available to handle new clients on a first come, first serve basis. Call xxx-xxxx or come by our office ASAP.

We are located at	

www.YOURWEBSITE.com

\$25.00 OFF

Any Tax Filing Service

WARNING

Don't File Your Taxes Until You Read This.

Are You Are <u>Sick</u> of the IRS, <u>Tired</u> of the Gov't <u>Mandating</u> Your Life, <u>Frustrated</u> You Never Have Any "Peace" Once You've Filed Your Taxes, <u>Embarrassed</u> You Seem Not to Understand All the New Healthcare Requirements, <u>Ashamed</u> You Don't Feel Completely Comfortable With Filing Your Tax Return on Your Own This Year, <u>Worried</u> There Might Be Some <u>Unresolved</u> Tax Form Out There That Could Come Back To Bite You When Uncle Sam Sends Out IRS Audit Notices!

Our Experienced Tax Team Can Help You Now!

We know life is hard enough as it is, but throw into the mix all of the new healthcare reporting requirements and last minute tax law updates this year ... heck, we understand. That's why we've broken the mold for what's expected of a professional tax firm. We are today's NEW Tax Pro Team and we go out of our way to help taxpayers with questions about how Obamacare & the IRS impact their financial life. Yes -- we are busy, but we will do whatever we can to help you out -- and with a smile on our face!

Now, if you are currently experiencing Tax Filing Anxiety, Contact Our Office Right Now To Receive A

Worry-Free Obamacare IRS Accuracy Guarantee, PLUS A Special \$25.00 OFF Any Tax Service Courtesy Discount!

(Mention this ad.)

We have a limited number of Experienced Tax Pro Team Members available to handle new clients on a first come, first serve basis. So call xxx-xxxx or come by our office ASAP.

We are located at	

www.YOURTAXBIZ.com

Add Strong Client Testimonial HERE

4 Step Tax Office Inbound Call Strategy Designed To Increase Your New Tax Client Sales ... Without Wasting Time On The Phone!

Purpose: To capture as many leads (people interested in your Tax

Services) and increase the percentage of these inquiries showing up in your office without wasting too much of your

receptionist's time.

Goal: Capture 10X more contact info of people inquiring about your

services (compared to last tax season) and increase your "closing" percentage (people who actually show up in your

office) by 100%.

Strategy: 1) Qualify, 2) Lead Capture, 3) Follow Up & 4)Close!

When a call comes into your office, the person answering the phone must do the following to maximize sales and not waste time.

Step #1

Answer the caller's question with a question(s). (Qualify)

Step #2

Ask the caller for his /her name and email address. Offer Special Report or alternative tool which answers the most common questions. (Lead Capture)

Step #3

Automate sending of Special Report so caller receives info immediately AND on an ongoing basis if person's not ready to file taxes yet. **(Follow Up)**

Step #4

Give an A / B option (yes or yes response) for coming to your tax office. **(Close)**

In most cases, someone calling your office to ask a question can NOT be helped over the phone properly. It is best to find out if they are an existing client or not, (Step 1) then provide an immediate benefit for calling, (Step 2 & Step 3) ... then encouraging them to commit to a time when they are able to come into your office. (Step 4)

By the way, after you've asked a question or two to better understand where the prospect is coming from (helping them find out what they really want because many times they truthfully don't know) you come across as an expert seeking to help solve their tax problems. And when you are able to quickly and succinctly give them strong reasons for coming to you for the right kind of Tax Professional Help in the first couple of minutes of your conversation, you build confidence and assurance especially if the prospect has called some other tax firm.

OK, now it's time to close the deal. Again, this is a base almost every tax business misses. You gotta ASK them to come to your tax office. Some tax businesses are appointment only, some are walk in only (with no appointments) and still others are some kind of hybrid of both. No matter what you do in your particular tax office, you can still offer an

"A / B Option" giving the prospect two ways to say yes to choosing you. You are assuming the sale and many more times than not this is the best approach to get a new person to "try you out" verses leaving the decision up them once they hang up the phone.

By not qualifying who is calling you on the phone and just answering whatever question they ask, and then being rushed to get off the phone (without closing them) because "you're busy" with whatever You are NOT taking the phone inquiries seriously (the actual life blood of your business) and you are in danger of flushing thousands and thousands of dollars right down the toilet!

EXAMPLES of Scripts For Inbound Calls

Example #1

Caller: Hi, I'm calling to file my taxes ... how much does it cost?

YOU: Well, let me ask you a couple of quick questions ... Have you

ever filed your taxes with us in the past? What's your main

question or concern you'd like help with?

Caller: I normally fill out our tax forms myself, but this year I'm not sure

about some of the new tax laws related to Obamacare. I just want a professional to help us this year and make sure we're

not missing anything.

YOU: Great. We can help you with that. I'll even send you a Special

Report with some of the details. What's your first name?

____ And your last name is? ____ And what email

address do I send the Special Report to? _____

Caller: But what are your tax services going to cost me? I've never

paid a tax business to file my taxes before.

YOU: Well, since we charge by the form and the complexity of the

return, I'm unable to say for sure over the phone. The best way to handle this is to bring everything you're got to our office and

we'll meet with you to review at no charge.

YOU: Now, would Tuesday afternoon be a good time or would

Wednesday morning work better for your schedule?

Caller: During the week I'm busy. Are you open at night or on

Saturdays?

YOU: Yes, I can schedule you now for 10am this Saturday. Do you

know where we are located? (give directions) I'll send you a list of what to bring by email. [confirm email address again]

Example #2

Caller: Hi, I have a tax question ... can you help me?

YOU: Sure, but let me ask you a quick question first. Are you one of

our tax clients?

Caller: No, I was just looking for some help with my taxes. I'm not sure

how to fill out these new tax forms this year.

YOU: OK, the best way for me to help you would be for you to bring

everything you have related to filing your taxes this year to our office. That way we can get a full picture of how best to help you. Have you ever used a paid tax practitioner before?

Caller: No, I just want some help over the phone.

YOU: I'm sorry, we don't offer free tax advice over the phone. I can

send you some more information about how our tax practice can help you, what's your name? _____ And your

email address?

Caller: I don't want to give you my email address.

YOU: OK, if you don't want me to email you our Special Report, the

only other way I can help you is set up an appointment with one

of our tax preparers. They will be able to answer your tax questions, but for a consultation fee starting at \$150 per hour.

Caller: No, I'll just call someone else.

NOTE: This is a successful call for your receptionist because you didn't

tie up the life blood of your business (your phone line) very long with a "tire kicker" or a poor client prospect. Remember,

everyone is NOT a good candidate to be your client.

HUGE Extra Money-Making Strategy

<u>See next page</u>. Add this 1 sheet of paper to your tax preparation procedure process with EVERY client, and watch your profits soar!

That means you MUST "Assume the Sale" ... **no selling required**. Go to your tax software now and include this IRS Audit Protection Service with EVERY return. During tax season, when you finish a client's tax return ... explain the forms and do what you normally would do and say "because of the New Healthcare Laws, this is your IRS Audit Protection" ... then go to the next form and say, "this is your _____" etc.

This strategy WORKS! But not everyone will want this service. (Based on feedback from my RTBS Coaching Clients who use this strategy, about 15% to 20% will opt out). Again, that's ok because 4 out of 5 of your clients WILL pay you more money and you will be able to service them better in the off season. [A true win / win.]

If someone does not want the IRS Audit Protection, then get them to sign their name at the bottom of the page so you have documentation to cover yourself. So if/when they call you in the off season wanting your help with an IRS letter, they know in advance what your HIGHER fees will be. [They should pay you in advance before you begin work.]

Just make copies and have these sheets ready to provide for your client at the tax prep desk when needed this tax season.

Do not start the new year without setting up this strategy in your office!

Covers-You-Like-A-Blanket

The ObamaCare IRS Protection Worry-Free Guarantee

ObamaCare still has many unknowns and the effects on the tax code are at best murky. New Healthcare Laws have many taxpayers worried, not only now – but after April 15th when Uncle Sam sends out his "love letters" asking for more money. Yes, the IRS is out of control! Thousands of new IRS agents have recently been hired to do one thing -- collect as much money for our cash-strapped government as possible. The problem is MOST of the "love letters" being mailed out by the Internal Revenue Service are a fishing expedition. They hope you pay the money. If you don't, the IRS doesn't mind charging you penalties and interest. The burden is on you ... guilty until proven innocent in their eyes. [Sad, I know.] So the odds of YOU getting audited or receiving one of these IRS letters are higher than ever! And since Healthcare Reporting has now been added into the tax code, these "love letters" from Uncle Sam are expected to increase!

MY SOLUTION FOR YOU: Responding to these simple written IRS notices can be expensive and time-consuming -- not to mention an actual audit can mean a real financial disruption. But I have created a solution -- my Worry Free ObamaCare IRS Protection Plan. This service COVERS YOU LIKE A BLANKET and helps shield you from these unexpected costs. The Fee works like an unofficial insurance policy. [Only \$99.00] If (When) you get contacted by the IRS, I will perform the following services:

- I'll respond to written notices from federal, state, or local taxing authorities. (Regular fee: \$300.00)
- I'll waive my fee audit representation.
- I'll provide up to two hour(s) of additional service.
- I'll provide additional copies of your tax returns upon your request
- I'll prepare income verification ("comfort") letters for lenders or other parties.

Date

Client Signature

NOTES

The Ultimate Tax Biz Success Roadmap PART 3

Week of:

Jan. 30th Tracking

Feb. 6th Management

Feb. 13th Accountability

Feb. 20th Leadership

Measure / Track

- make decisions using FACTS (don't guess)
- · learn the "important" numbers in your business
- define success can it be measured?
- keep short accounts (daily, weekly targets)
- accurate assessment of tax season
- · link all measurement to specific goals
- · real accountability

"Script Your Office Flow"

What does the perfect scenario of a client using your services look like?

Existing Client New Client Walk In Appointment Drop Off

You role play while someone else videos you in each scenario

Replay Video

- Write Down in Step-By-Step Format
- Highlight KEY Areas To Focus Your Attention [Profit Points]
- Decide What "Tools" Can Be Used For Greater Success

Automate Operations

(as much as you can)

Front

- Lead Capture
- · Self-Check In
- Verify Needed Items for Service

Middle

- Track Tax Prep Time
- · Simplify Tell-A-Friend
- Accept / Document Testimonials

Back

- Return Review Tracking [Accountability]
- · Up-sell Services Trigger
- Thank You Follow Up

Operations BEFORE Client Walks In Office

Temporary Signage

Updating Sales Messages During Tax Season

Coordinating External "Mavens"

Recommendation:

Go outside the front of your tax office Walk in each direction as far as you can (make sure you can SEE your office)

What can you do to ATTRACT new tax clients to your door?

Operations

<u>AFTER</u> Client Leaves Office

What do they have in their hand?

What have they been instructed to do?

What message will their receive on their I-phone?

Renegade Wealth Advice:

Hire A "Runner" To Deliver _____ SAME DAY to

Your

Champion Clients

- -Flowers
- -Candy
- -Handwritten Note

NOTES

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The Ultimate Tax Biz Success Roadmap PART 4

Week of:

Feb. 27th Mid-Season Evaluation

Mar. 6th Adjustments

Mar. 13th Motivation

Mar. 20th Prep for Final Push

Cover Letter On Your Tax Practice's Letterhead

Dear < name >,

We specialize in helping small business owners make more profit!

Being a business owner can be rewarding as it is challenging. As a business owner like you, I can related to your frustrations and celebrate your triumphs. Whether you're a new business or have been in business for 20 years, I understand what you're going through because I've been there.

We offer much more than an "ordinary" tax professional. We don't just put numbers in the computer and hand you reports. We take the time to explain what those numbers mean and most importantly, what you can do to improve them. We understand every company is unique and our clients enjoy the personal one-on-one service we provide.

What To Do Now

Enclosed you'll find a guaranteed way for us save your business (at least) \$10,000.00! Please read my letter and if you choose, give me a call to set up a time to talk. I know you will be thrilled with what we can do for you and your business.

Call (xxx) xxx-xxxx or Email me directly <u>abcde@12345.com</u> If you'd like more info about our tax firm, go to <u>www.abcde12345.com</u>

Best Regards, [tax biz owner's name]

Most Business Owners Are So Busy Working "In" Their Business ... They Have Little Time To Work "On" It!

How To Save Your Business (At Least) \$10,000.00 In The Next 12 Months ...

If we can't save at least \$10,000 in taxes or other expenses you're overpaying for.

You don't owe us a cent for our time... GUARANTEED!

Will you do me a favor, and answer a short question:

DO YOU KNOW THE SECRET TO DRIVING MORE PROFIT TO YOUR BOTTOM LINE IN GOOD TIMES OR BAD?

Do you think you know? If you're not sure, then read on! No one has to tell you that the last couple years have changed the way any business works, or, in a lot of cases, doesn't work. Maybe you have felt the irritation of knowing you are good at what you do, and not seeing the rewards for all your talent and struggles.

You probably always thought that being good should be good enough.

IT ISN'T THAT WAY ANYMORE!

Maybe in the old days. Now a days ... Just being good isn't good enough.

There are a lot of gremlins fighting you:

The government regulators. The IRS. Your competition. The bank. Your employees. The insurance company. Everyone! Really, tell me the truth.

Can you ever remember a time when it was so darn hard to make an honest buck? You had the guts, the intelligence and the drive to start your own business. However, while the economy may not be completely in the tank right now, competition is fierce and new customers are hard to find. Sales may even be up, while profits are down. New powerful trends are shaping the way business is conducted.

Yes, there has been a deep, fundamental change in the way people think about their money. Both individuals and businesses. Yes, most businesses are so buried in daily grind and detail, they avoid planning and "stepping back" to look at the big picture with an objective eye. Or worse, they...

DON'T MAKE ANY DECISION AT ALL!

This problem of being so busy working "in" your business, and not having enough time to plan and work "on" your business, causes the loss of thousands of dollars in "back end" sales and profits. Where the real money is made ... or lost in a business! Lack of time to plan and make appropriate adjustments is causing most entrepreneurs to experience THE big problem:

Lousy cash flow.

Are your customers paying you like turtles crawling through mud? If they are, it's because their customers are paying them like dripping molasses!

Unless you have clear and concise solution to this problem and an easy-to-follow, <u>doable</u> plan, your lack-of-cash issue can (and will eventually) suck the life blood right out of your business altogether!

A REAL WORLD INSIDE YOUR BUSINESS SYSTEM IS KEY!

The solution will not be found "outside" the doors of your business. "It" will begin "inside your head", during the time that you allocate to work "ON" you business … not the 8-12 hours a day that most business owners mistakenly invest only working "IN" their business!

WHEN YOU OWN YOUR OWN BUSINESS YOU'RE ON YOUR OWN!

The help certainly isn't going to come from the local bank or any of their kind – is it? Why the heck do they even pretend that bankers have the slightest understanding of what it means to be a small business owner anyway? Isn't it *amazing* how they are so helpful when times are tough? (Like getting up to "help" you find the door as they escort you out after turning your loan down.)

Oh yeah, let's not forget our friends over at the IRS.

But Life Can Get Better, You Can Make More Money!

We cut through the clutter, and zero in on specific points that can literally save you thousands of dollars in taxes and expenses that most businesses frequently overpay for! Then you'll have more time to develop a conveyor belt of new customers for your business or practice and have the opportunity to speak with your existing customers to add thousands of more dollars to your bottom line.

So we don't waste any time, we prepare an initial report for each business client that demonstrates exactly what we can do for you, and we back it up with a complete satisfaction guarantee.

In our initial report, we promise to show you how to:

- " Save at <u>least</u> \$10,000 in taxes or other expenses that most business owners frequently over for because they lack time to carefully review and plan.
- " Make sure you *optimize* <u>all</u> financial and tax advantages within your business by applying 3 planning techniques that many accountants often miss ... or don't bother telling you about!
- " Eliminate unnecessary costs to make <u>sure</u> you pay the *least* amount possible. Saving thousands in formerly wasted dollars!

Think about this. If you have 10% profit margin, and you save \$10,000 in taxes or other expenses, that is the same as:

MAKING AN EXTRA \$100,000 OF SALES! FOR FREE!

\$100,000 of sales at a 10% margin would put \$10,000 in your pocket. Saving \$10,000 of taxes also puts \$10,000 in your pocket! Make sense? "But, wait!" you are thinking. This kind of work is going to cost a lot of money. "Money you don't have right now," ... Not so.

Our offer is straightforward and simple:

We'll provide you with a business checkup, diagnosis and written report that promises to save you at <u>least</u> \$10,000 in taxes or other financial expenses that you're overpaying for ... or you don't owe us a cent for our time ... Guaranteed! Fair enough?

"WHAT'S THE CATCH" - YOU SAY?

There is none.

We have simply found this to be the fairest and most effective way for us to <u>demonstrate</u> to business owners of all different kinds of businesses that we can actually <u>deliver</u> the kind of results that we say we can!

We are very good at what we do, and we're confident enough about it to offer a guarantee that we can deliver at least \$10,000 in tax or other financial savings to you, as a result of our diagnosis and report. If we can't deliver it, you don't owe a cent for the report or our time. (Yes, even if the amount is \$8,700 or anywhere under \$10,000)

SO HOW MUCH DOES IT COST IF WE <u>CAN</u> ... SAVE YOU \$10,000 OR MORE???

I think you'll find this part of the offer to be very fair too.

In return for our tax saving money diagnosis and consultation, if we <u>ARE</u> able to save you \$10,000 or more ... in taxes or other financial expenses, all we ask is that you <u>consider</u> allowing our tax business the opportunity to work with you on whatever tax related areas of your business or personal life needing the most help.

When I say "consider", I mean just that. There is no obligation, nor will you get any push or pressure from us at all.

You will not be subjected to a disguised sales presentation. Or a "pitch". Or anything, other than a demonstration of the tax and financial services that we have identified for you, and a "brief description" of how our management and tax service works.

Frankly, if you are already paying a CPA or accounting service to do your taxes, I think you'll be *amazed* at how much more we provide. (We are usually able to identify more than \$10,000 in tax and other savings in each report that we prepare.)

Don't take our word for it, we'll provide it to you in black and white on paper! However

IF YOU ARE NOT TOTALLY HAPPY WITH OUR REPORT AND SERVICE, THERE IS NO FURTHER OBLIGATION ON YOUR PART!

Our feeling is this: If we cannot demonstrate that we can save you at <u>least</u> \$10,000 in taxes or other expenses, we haven't earned the right to ask you to do business with us. If, at the end of our discussion, you do not feel like we can help you, or that you want to keep doing what you're doing, etc., that's fine. And that's it. You go home with your report, and we leave it at that. **NO PRESSURE. NO SALES. NO HASSLES!**

Enclosed <u>Special Free Offer</u> For Small Business Owners

Small Business Owners (More) Vulnerable To Business Ending IRS Audits!

New Tax Code Changes Affect You ... Do NOT Expose Your Business (And Your Livelihood) To UNNECESSARY Tax Payments, Red Tape& Extra Bureaucratic Paperwork!

STOP The Ostrich-Like Denial -- Putting Your Head In The Sand, Thinking No One Will See Your Lack Of Tax Compliance

The Truth Is The IRS Eventually Sees Everything
So It's Mandatory To Have A Tax Expert On Your Side, Working for You!

<u>Can You Afford To Leave Yourself Vulnerable</u> ... Exposed To Potential <u>Tax Problems And Financial Trouble – Even Causing Your Business To Close</u>?

<first name>,

Hey, I know you are busy! Your business never seems to stop. You take your biz home with you, it calls you on your cell phone during "off hours" and when you're actually trying to take a vacation with your family, you still have to excuse yourself at various times to handle the "emergency" of the week!

Running a small business month in and month out is an uphill battle. Gotta get the revenue up and make a few more sales this week ... and next. Employees are fighting with each other over the same ol' junk. They don't want to take the blame for a problem and your customers are upset, which means it all comes back on you – the owner. Since you're not some huge company, you have your hands in just about everything in your business. You are a "Jack-Of All-Trades" out of necessity, not because you want to.

I bet no one told you when you started your business, KEEPING YOUR HEAD ABOVE WATER AND MAKING A LIVING WOULD BE THIS HARD! Well, not to add salt to an open wound, but it has been my experience that 9 out of 10 small business owners also underestimate (some *grossly* underestimate) the time, attention-to-detail and expert knowledge it takes to keep up with TAX ESTIMATES, REPORTING, various QUARTERLY and ANNUAL TAX FILINGS and getting <u>accurate</u> MONTHLY RECORD KEEPING so you actually know what's going on in your business!

"TAXES" ...A REAL HEADACHE – And Not Much Fun To Deal With By Yourself!

New Tax Laws and Regulations ... Compliance Issues ... Local, State and Federal Taxes ... Quarterly Estimated Taxes ... Payroll Taxes ... Sales Tax ... Unemployment Taxes ... Personal Property Taxes ... Personal and Business Tax Returns ... and on and on – WHAT A BUREAUCRATIC MESS!

"So, Are You Embarrassed To Ask For Tax Help?"

Let me introduce myself. My name is Jon Neal. I'm a professional in the area of accounting, taxes and many other financial matters. I do this kind of work every day. What is complicated and hard and maybe even a little scary for you if you're dealing with the IRS, is simple, easy and straightforward for me. Does that make me better than you?

Of course not.

What this means is, you are good at what you do in your business and when it comes to TAXES, I'm pretty darn good myself. (I'm not going to toot my own horn though. Read the comments from my tax clients for yourself later on in this letter.)

Let Me Give You An Example: If you needed brain surgery, would you try and do it yourself or get someone not very qualified who'd do the job for cheap? Look, you and I both know the answer to that. You would find an expert brain surgeon to operate on you. And you

wouldn't be the least bit embarrassed, right? (Actually, it would be irresponsible and even foolish if you didn't take the time to find the best doctor available to help you.)

The same is true when it comes to taxes. For whatever reason, too many small business owners are ashamed to ask for help ... PLUS, you are too busy to make sure all of your "i's" are dotted and "t's" are crossed with the mountain of tax related paperwork, regulations and filing of reports. So what ends up happening? You "close your eyes" (so to speak) and hope for the best.

Now would you act like an ostrich with your head in the sand if you were going into brain surgery? (Exactly ... you would not.) So DO NOT follow this same path when dealing with the IRS, either. Uncle Sam's financial bite and "asset freeze game" the IRS plays is a horrible experience! Just like major surgery that can affect your life and livelihood – you don't want to go down this road and deal with any of those pinhead government bureaucrats on these terms (especially alone) – I promise!

THIS IS NOT OPTIONAL. AS A BUSINESS OWNER, YOU ARE REQUIRED TO FOLLOW ALL OF THE TAX LAWS AND BE UP-TO-SPEED ON EVERY NEW TAX CODE WHICH APPLIES TO YOUR BUSINESS.

If you get caught NOT paying the proper amount of taxes the IRS says you owe or NOT filing your estimated taxes or related local, state or federal paperwork on time — You Won't Get Away With Saying "The Dog Ate My Homework" Like You Did Back In Elementary School ... That Excuse Won't Work With The IRS!

NOW is the time for <u>you</u> to pay more attention to your small business' tax situation which is slowly, but surely getting worse. Of course, no one can see it YET. But just like a stopped up toilet, eventually a "big mess" is gonna overflow, causing damage. The difference is cleaning up this kind of mess in your bathroom only requires a mop and some Lysol spray. Cleaning up a small business tax filing mess with the IRS is MUCH more involved, financially messier and actually EMBARRASSING when your friends and neighbors find out!

I'd like you to read the following ...

Can You Relate To Any Of These <u>Small Business Owner's Stories?</u>

Hear How Small Business Owners (Just Like You) Have Been Set Free From Tax Filing Worries And Fear Of The IRS ... Now They Operate Their Businesses More Successfully, Not Scrambling At The Last Minute To Keep Up With Their Tax Filing Paperwork!

ADD SMALL BIZ TESTIMONIALS HERE: Testimonial #1

Testimonial #2



Special Free Offer For the Busy Small Business Owner

[please turn to next page]

FREE (NO OBLIGATION) Business 57 Point Check Up

Guaranteed To Save You (At Least) \$10,000 In The Next 12 Months!

If you'd like to take me up on my (limited time) Free Business 57 Point Check Up -- just call our office number below or email if you prefer.

Or, if you'd rather speak with me directly about your tax situation and you'd like to set up a phone appointment soon (this would depend on both of our schedules), contact my office to leave a message and someone from my staff will be in touch within 1 or 2 business days to confirm a time and date that works best.

The ball is in your court so to speak ... so I look forward to hearing from you soon! Oh, and if you'd like more info on me or my tax and accounting business, just go online to our website. www.xyztaxfirm.com

Sincerely,

<tax biz owner's name> <tax firm's name>

D 0				•	•
PS	Here'	sa	picture	of me	and

Look forward to speaking with you soon.

[include an interesting picture of you and whatever you want at the end of this page ... the point is to show you as a real person and your tax business as a place where people with their tax problems get help]

Tax Professional
Business Check-up
&
Prospect Questionnaire

How To Save Your Business (At Least) \$10,000.00 In The Next 12 Months ... Guaranteed!

Ву
(Your Name)
(Your Tax Business)

Business Check List & Questionnaire To Be Used As A Guide

For Office Use Only
(TAX PROFESSIONAL
NAME & CONTACT INFO)

BUSINESS OWNER "CHECK-UP" QUESTIONNAIRE

INSTRUCTIONS FOR BUSINESS OWNER:

Please answer the following questions as thoroughly as possible. Your responses will be very important for us to make the most of our time together at your scheduled appointment. Upon completion of the questions please fax to (111) 111-1111.

Name of Business:				
How long have you operat	ed the business?:			
Type of legal structure: LLC	Sole-proprietor; Part	nership;	C-Corporation;	S-Corporation;
	LLC being taxed: Sole-pro	prietor, p	eartnership or cor	poration
Type of business: (what do	you do)			
Revenues in 20: Net profit 20:				
Number of employees:				
Do you do your own in-ho	use payroll or outsource: Ir	1-house	Outsource	
Payroll Frequency: weekly	, every two weeks, twice a	month, r	nonthly, other:	

How are your accounting records organized?
Use Accounting Software
QuickBooks
Peachtree
Other:
What services does your current tax professional/CPA do for you?

Tax returns

Payroll
Monthly accounting
Other:

What is the most significant business issue you currently face?

Anything you wish your current tax professional/CPA would do for you that currently they are not?

On a scale of 1 to 5 with 1 being not concerned and 5 being greatly concerned, what are your concerns from the following?

Collection of accounts receivable
Cash controls
Understanding what your financial statement is telling you
Training and comprehension of your accounting staff
Computer information systems (Management Information Systems)
Morale of staff
Employee benefit programs
Cash flow of business
Amount of taxes paid
Business succession planning
Payroll law and tax compliance
Corporate debt load
Getting the right reports to help you manage your business
Operations of your business
Optimization of your salary and benefits
Making sure you receive every deduction allowed by law and not paying more
in taxes than legally required

Help with keeping your books and records (to make sure you are protected
from the IRS)
Making sure you have every tool, information and knowledge to operate and
grow the business the way you want to (so that it does not run you).
Employees

Any concerns you have that you want us to be aware of prior to our appointment?

Please FAX completed questionnaire to (111) 111-1111 (TAX PROFESSIONAL NAME & CONTACT INFO)

Business "Check Up" Questionnaire Part II

- 1) Do you have a buy/sell agreement in place?
- 2) Do you have a written business plan?
- 3) Are all your business and personal tax returns current?
- 4) What would you like to accomplish with your product or service?
- 5) What challenges do you foresee?
- 6) To what extent is increased net profit important?
- 7) What would happen to your business if something happened to you?
- 8) What would happen to your family if something happened to you?

21) Do you have someone in-house do your accounting or do you outsource it?
22) Who does your bank reconciliations?
23) Are your bank reconciliations current?
24) Does your business have a budget?
1) If so, what expense areas are higher than budget?
2) If so, what income areas are lower than budget?
25) List out the process when a customer/client/patient walks in your door
26) List your top three or five key personal and their position and duties
27) What growth opportunities do you see for your business?
28) Of these growth opportunities which ones are you actively pursuing?
29) Explain what you are doing to pursue the opportunities
30) Describe a normal workday for yourself
31) Name the three most important things you delegate to someone else?
32) When a customer/client/patient has a problem or complaint; describe a normal approach to handling the problem

- 33) If you have children, do they work in your business?
- 34) Have you hired your spouse to work in your business?
- 35) Do you have medical expenses you pay out of pocket, such as co-pays, over the counter medications, deductibles, health insurance?
 - 1) If so, what is the total amount of your health insurance premiums?
 - 2) If so, what is the total amount of other medical expenses?
- 36) What was the last business book you read and when did you read it?
- 37) When was the last time you went to a seminar or course to help you in your business?
- 38) Do you have written job descriptions for your employees?
- 39) If your business involves collecting cash please explain the process of collecting the cash, accounting for the cash and making sure the cash gets in the bank? All of it!
- 40) If you do not collect all your payment at the time of service (you offer accounts receivable), explain your collection process?
- 41) Do you offer health insurance for your employees?
- 42) How many employees have left you in the past year and how many have you had to hire?
- 43) Who are your most profitable customer and/or ideal customer?
- 44) What are the five most common questions people ask of your company over the phone?
- 45) If you own a corporation do you prepare annual minutes?
 - 1) If so, please provide the most recent minutes

46) Do you have written goals for your business?
47) Do you have written goals for your personal life?
48) What do you do better than anyone else? Why should customers use your company versus any other option available to them?
49) What is your process for obtaining, collecting and analyzing your business leads/contacts?
50) When was the last time your life insurance policies were analyzed?
51) What is your biggest complaint/frustration with your current accounting system?
52) How much time to you take off each year?
53) Draw out a simple organizational chart for your business. (Please put on separate sheet of paper and include with this questionnaire.
54) What segment of your business is the most profitable?
1) What is number two?2) What dollar amount or percentage is between one and two?
55) Do you routinely send your existing customers some sort of continuity program such as a newsletter, email or other mail correspondence?
a. If so, please describe:
b. What is the frequency?
c. Do you prepare it in-house or outsource the mailing?

- 56) Do you have a process of getting people who bought from you in the past to buy from you now?
 - a. If so, please describe:
- 57) Someone meets you in an elevator and asks, "So, what do you do?" What is your answer?

Joint Venture Best Practices for Tax Pros

Two paths to take when choosing a JV strategy. Choose one or both:

- A) What do your tax clients want more of?
- B) What type of tax clients do you want more of?

Path A

What do your tax clients want more of?

#1

Survey or ask your clients what they WANT and then make arrangements to SELL IT to them in an irresistible way.

#2

Usually these new products and/or services are tax related, but they don't have to be. Most common in the tax industry are financial services, investments, insurance and tax resolution.

#3

Find another professional (or multiple pros) who specializes in one or more of the services, then gage their interest in working together with you to provide these services to your clients. [Note: Not all business owners want to joint venture with other companies.]

#4

If interested, tell them you will provide the introduction to your clients and endorsement of his / her product or service to your list, then ask what compensation structure would be fair for these services.

#5

Many times the deal is a simple 50/50 split. Depending on costs involved, they may get paid first, then the net is split in half for both parties. [Note: At the end of the day, the split could be ANY combination as long as both parties are happy with the compensation structure.]

#6

In my mind, the bigger issue is who owns / gets access to and control of the client. Everything can run through you (the host) or you can offer full access to new JV partner and they sell as much as they can, giving you back your agreed upon cut. [Many different kinds of possibilities here. Usually, you want to control access to client like a tool booth.]

#7

Other big issue on compensation. Is the split on the 1st sale or for the 1st year or is compensation ongoing? My point is you can set the deal up however you want. Whatever makes the most sense for both parties based on delivery of service and personal preference factors. Plus, it obviously depends on what is being sold. [Note: As the host, you want to offer as much as you can to your new JV partner without giving away too much. This is one of the reasons why you always ask them WHAT THEY WANT and negotiate from there.]

Path B

What type of tax clients do you want more of?

#1

What businesses or organizations have the same profile of person(s) matching your answer to WHO is your best type of client.

MAKE A LIST

#2

What's the STORY or the connection between your tax biz and this other business. [Note: You don't have to have a story, but it sure helps increase sales.]

#3

Write a short proposition on one page explaining a simple way for you both to make money working together. Up front, provide what's "in it for them" and that YOU WILL DO ALL THE WORK involved in making a joint venture happen and run smoothly.

#4

In this scenario, you want to write the sales / marketing pieces, develop a phone script, provide whatever lead capture system that's needed, then convert them to buyers. [Note: Even though the promotional material will be coming from the other business, you have pre-written the campaign for them so they just review and give the ok.]

#5

The value the other business or organization brings to your JV deal is their relationship with these clients or members who are

well matched to do business with you. Once they (your JV partnering biz) endorse you, giving your tax biz the "seal of approval" ... then the rest is handled like you would any other marketing campaign.

#6

In most cases, the marketing material must get added to contact material the host you are Joint Venturing with normally uses. So if you are mailing a letter from the president of the company, it needs to be on company letterhead and mailed in a company envelope with his/her name on it. If emailing, the marketing material must come from the president's email address [or something similar showing the e-zine is clearly from that company] If offering a DVD, or an online video series or whatever, the key is the material comes from the person with the relationship with the clients you want to do business with.

#7

Readership is a BIG deal. Getting someone to stop what they are doing and watch, listen to or read the message is vital to the promotion. When you do a JV with someone else's clients, this is mainly what you are "buying" when you send them their half of the money. If you tried to send this same sales message to a cold list, your readership is so low, it's much harder / more costly to add new clients this way.

#8

Most common examples of media used in a Joint Ventures are Direct Mail, Email, TeleSeminar, Webcast, In-Person Seminar and Telemarketing. Usually, the most effective JV campaigns have several combinations of these media examples working strategically together.

Here are a few SAMPLE Joint Ventures ...

Path A & B

Example 1

Insurance company wants to sell more health insurance policies due to ObamaCare. The insurance biz owner wants to bundle their health insurance services with quality tax preparation services because he sees his customers needing both services together. As a tax biz owner, you see these insurance clients as well matched for your client base. The insurance guy asks you to prepare all of his customer's tax returns. [He is upfront telling his insurance clients about your joint venture relationship.] The end user client is happy because they are getting the best of both worlds – an expert in tax and an expert in health insurance helping solve these financial filing requirements.

And what about the money? Well, you get your normal tax prep fee of \$300 and the insurance guy gets a flat \$50 for every tax return he sends your way. In return, you begin recommending his insurance biz to your tax clients. Depending on the laws in your state, you can get a commission on each deal, or a small flat fee making the introduction. (\$25 for every tax client he meets with)

Example 2

You've surveyed your clients and you see the need in many of the tax returns you prepare each tax season – they want a financial advisor to help them with their investments. You decide this year to have a friend of yours set up a desk (in a side room) inside your office during tax season. He is an Investment Pro and will be very helpful to at least half of your tax clients. When your client comes in this year, you introduce and make the recommendation. Now you must follow the laws in your state on compensation. In many cases, it makes a lot of sense to get the appropriate financial license so you can enjoy a significant cut of the profits, not just one year, but ongoing. If you don't have a license, ask the Investment Pro a legal way for you to get compensated for making the introduction.

Example 3

One of your tax clients is the Director of a large charity you give to and are passionate about as well. You tell her you want to help raise money for the charity using the following plan. If she sends out a letter and a series of follow up emails (you write for her) to the large donor list telling the story of the importance of healthcare issues related to tax filing ... and then endorsing your tax biz (revealing she is a long-time client), you will donate 25% of your tax prep fees back to the charity in the new tax client's name. The Director agrees, but adds you must offer a series of Free Healthcare Tax Seminars to the donors so the charity benefits even if someone doesn't hire you to help them with their taxes. That works out fine with you. Then, before these seminars, you send out a series of press releases inviting the local media to attend – again, helping raise awareness for the charity and building expert credibility as a Healthcare Tax Pro. [win/win/win]

Example 4

There are three high traffic businesses near your tax office. You want to set up a win / win JV with each of them. First, a grocery store. You speak to the manager and offer a couple of Free Healthcare Tax Lunch Seminars for their employees. These are offered on site and positioned as an extra benefit from the owner / management team. Once you build rapport with a handful of the staff, you obviously want to make sure the manager / owner is on board and liking how you are helping their employees. Then you work out a deal for them to include one of your promotional fliers in every bag of groceries for two weeks in January and/or February. I have found local store managers to be very receptive to doing this as long as you do something similar from your tax office.

Now you apply the same series of steps for the grocery store with the high traffic department store. Again, if you "give" first and offer benefits that will be in high demand during the early stages of tax season, store managers will allow you access to their high traffic flow. Now whatever the other high traffic business is that's near you tax office geographically will be your next target. Find out what would be helpful for their employees and give it to

them. You will be surprised by how much access you can get when you have something people want.

[Note: Don't be afraid to ask them to propose some other options for helping you get more tax clients. Some of the best JV deals like this I've even done came from THEIR suggestions because they know their customers!]

Example 5

Pick an occupation (nurse or teacher or whatever) you like preparing taxes for.

You should already have a "champion" as a client in that niche so you can build a story around their testimonial. Mail a letter, then follow up by phone and then email to every doctor's office or school [whatever occupation they are] in your area offering a Free Healthcare Tax TeleSeminar for ______. (that niche group) The whole promo is from your champion. [include their picture and the whole story in their voice]

You can position these TeleSeminars as Community Service Events and sponsored by the doctor's office or the principle of the school or whoever the leader is for that particular group. The Hook (or what's in it for the doctor or principle etc) is they are helping the community and their name / business / school will be featured in the press releases going out promoting the Special TeleSeminar.

[You can also send them a framed certificate for participating which they can put up in their lobby.] This will help them participate AGAIN when you come knocking the next time.

Your goal as the tax biz owner is to get as many participating leaders / owners / managers of that particular niche in your area to help you get the word out to their network of influence. You want as many people as possible "opting in" to your teleseminar so you can capture these qualified email addresses to follow up with later.

This strategy is a huge list builder. You are Joint Venturing with as many groups (with similar occupations) as possible and funneling them all into one place to group sell them and have the ability to follow up during tax season when they are ready to file their tax return.

In this particular example, you don't have to pay any splits or commission to your JV partners. They just helped you gather a list and their compensation is recognition in the community.

OK, I just gave you 5 completely different sample joint ventures. From these examples, I hope you can see the possibilities are endless. The best advice I have for you in this area is to go DO a JV deal, get your hands dirty and learn how to grow your tax business even faster using this money-making strategy.

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The Ultimate Tax Biz Success Roadmap PART 5

Week of:

Mar. 27th Prep Procrastinator Promos

Apr. 3rd Run "Last Chance" Ads

Apr. 10th Finish Strong

Apr. 17th Stewardship

Bonus

Apr. 24th Out of the Office ... Some Place Very Relaxing

WARNING: prospect's first name Procrastinator Alert!

If You Have NOT Yet Filed Your Tax Return This Year . . . Read This Now!

Dear < first name >,

Look, I know you've got plenty going on this time of year. And I know it's a huge pain to have to pull everything together for your taxes right now. (It just seems like everything needs your attention at this time in the spring.)

Worrying about the April 15th IRS deadline can take its toll. The stress eats at your stomach! But here's the bad news about filing with Uncle Sam ...

Congress Wasted No Time Implementing HUNDREDS OF New Tax Law Changes This Year Alone!

So filling out a tax return that's CORRECT is even harder. Sure, many people get sucked in by the fancy advertising from those online tax software programs (even though, this year I've already processed a bunch of returns from frustrated online tax filing users!) . . . they print out the forms, hit "Submit" and ... hope for the best!

<first name>, Can You Say "IRS Audit"?

Sure, you may decide to try the same approach ... cover your eyes and ears and file your return, just HOPING that the IRS doesn't look at YOUR return ... or even worse, receiving that letter in the mail from a stuck-up IRS agent wanting to go over your taxes personally with you—line-by-line. Ugh ...

Look, I'm not trying to feed the fire here, but the IRS has notified other professionals (like me) that they will be increasing the numbers of audits this tax season. A pain for "regular" taxpayers out there. Well, unless you've got a ...

Fast Tax Preparation Service With A

"No Worries" Accuracy Guarantee

Hi ... my name is < your name >, owner of < your tax biz > — and we've already taken care of hundreds of taxpayers just like you this tax season ... and none of them worry anymore. Why is that?

(turn over for more)

Simple. At <your tax biz>, not only do we promise to give you the Biggest and Fastest Tax Refund Allowed By Law ... we offer GUARANTEED "NO WORRIES" when filing your taxes with the IRS, so you can sleep like a happy puppy this and every year, never worrying about Uncle Sam!

Special Offer: PROCRASTINATORS ONLY:

Sure, I'm a "numbers person" and I'm very organized—but we ALL know what it's like to procrastinate from time to time! So I want to extend a special offer for all those folks reading this letter who have NOT filed their taxes this year!

If that's you, and you haven't filed yet, chances are very good you WILL NEED HELP dealing with the IRS. And at <your tax biz>, we just want to say "It's OK." Just bring in all your tax info to our office and if you do so by April 14th, I'll give you an unheard of \$30.00 GIFT CERTIFICATE towards any tax service!

Let me tell it to you straight—I know of no other professional tax firm in the area that will offer you—the taxpayer who has waited until April to file their tax return—a gift certificate like this (in fact—and I don't want to name names—but some national tax franchises actually raise their tax preparation prices in April to penalize those of you who have waited to the end of tax season to fil with the IRS)!

So why are we giving out a special Gift Certificate toward any tax service?

Again, this is simple. We want to give anybody who still isn't sure if they should use a professional tax practitioner to help them with the IRS—and give you the experience of letting the pros handle things ... getting YOU all of YOUR hard-earned money back from Uncle Sam. AND DO SO FASTER THAN ANY OTHER TAX FIRM IN THE AREA—GUARANTEED!

< First Name >, DON'T DELAY ANYMORE:

Beat The Last Minute Tax Filing Rush!

Pick up the phone and call our tax office ASAP so we can answer any questions you might have. Or, if you want to come on down now, that's fine. We're in crunch time, but we've made special arrangements to take care of folks like you, as guickly and efficiently as possible!

All year, we have been helping taxpayers in your situation sleep better (with more money in their pocket!) after filing their taxes with Uncle Sam. This year, you can join the <your tax biz family too.

Our "Procrastinator Special" Gift Certificate is waiting to be used by YOU!

See you before April 14th!

Sincerely,

<your name>

<your tax biz name & contact info>

WARNING:

NOT Filed Your Taxes Yet?



Are You <u>Sick</u> of the IRS, <u>Tired</u> of this Inconvenient April 15th Deadline, <u>Frustrated</u> You Never Have Any "Peace" Once You've Filed Your Taxes, <u>Embarrassed</u> You Seem to Always Wait Until the Last Minute, <u>Ashamed</u> You Don't Feel Completely Comfortable With the Whole Tax Filing Process AND In the Back of Your Mind, You Are <u>Worried</u> There Might Be Some <u>Unresolved</u> Tax Issue Out There That Could Come Back To Bite You!

Procrastinators Welcome!

We know life is hard enough as it is, but throw into the mix all of the "taxing" issues this time of year ... heck, we understand. That's why we've broken the mold for what's expected of professional tax firms and we go out of our way to accept taxpayers who have delayed their tax filing decision or have waited until the last minute. Yes -- we are busy, but we will do whatever we can to help you out -- and with a smile on our face! (And we promise to get a grin from ear to ear on your face as well when you leave!!)

Now, if you are currently experiencing Taxpayer IRS Deadline Anxiety, Contact Our Office Right Now To Receive A <u>Worry-Free Guaranteed Accurate Tax Return With A</u> <u>Special Procrastinator \$25.00 OFF Any Tax Service Discount!</u> (Mention this ad.)

We have a limited number of prof	fessional tax preparers available to handle new cl	ients
on a first come, first serve basis.	So call xxx-xxxx or come by our office ASAP. W	ve are
located at		

www.xxxxxxxxxxxxxxxx.com

"I HATE TAXES!"



Could Someone PLEASE Just File My Taxes For Me BEFORE The IRS's April 15th Deadline!

... the right way without all the hassles and headaches ... make sure I'm getting the most refund money back from Uncle Sam as possible ... and could you back up your work with a complete worry-free accuracy guarantee? Of course, I know I have procrastinated this year, but could you not charge me an arm and a leg (I'm happy to pay a fair price just to get this IRS monkey off my back) ... so really, I just want to give everything to a tax professional who knows what they are doing and can help me before April 15th ... Am I living in "dreamville" or could this really happen for me in the next couple of days?

The Answer is YES!

(We can help you but you must hurry and call us immediately!)

We Love To Help Procrastinators Before April 15th!

We have a limited number of professio	nal tax preparers available to handle new client
on a first come, first serve basis.	Call xxx-xxxx or come by our office ASAP.
We are located at	<u> </u>

www.xxxxxxxxxxxxx.com

Just Listen To These People Who Were Once Frustrated Like You

[included 2 or 3 client testimonials here]

\$25.00 Courtesy Discount

For Procrastinators Entering Our Office By 6:00pm on April 14th
(Must Call Our Tax Office In Advance!)

April 18th ...

How To Run An After Tax Season "Debriefing" Meeting And Truly Benefit From All The Fresh Ideas In Your Head And From Those Who Worked In Your Tax Office This Year!

What I'm about to share with you could increase your net income by 20% or more depending on how serious you are about improving your tax business.

MY ADVICE TO YOU:

Today -- send a memo to your staff and call a meeting for a week or 10 days later. It will be a tax office debrief meeting where you want to formally get their feedback. In advance of this meeting, you will need the following information from them. (Each employee will have their names kept confidential so they will have the opportunity to share freely.)

In your opinion, what are the TOP PRIORITIES we need to discuss in this after tax season debriefing meeting?

3 BEST

3 WORST

3 CHANGES NEEDED MOST AND HOW TO IMPLEMENT

You want their <u>in writing</u> feedback no later than 2 Days BEFORE the whole office debrief meeting. Example: So if you email your employees on April 22nd saying we will be having a staff meeting @ 10:00am to 1:00pm (serve lunch at the end) on April 30th ... please send me your in writing feedback no later than 5:00 pm on Friday 4/26/__.

You will compile all of the "best, worst and changes needed" into one full document to be passed out at the beginning of your meeting for all to review and become familiar with. (No names -- just the info!)

What do you think happens before the meeting?

As the owner (leader) the information you receive in advance of the meeting puts you in a very powerful position. You now have time to see where everyone is coming from beforehand [the good, the bad and the ugly] ... plus, you get to process several possible productive scenarios and improvements before the meeting has even started!

Truthfully, the secret to being a good leader is knowing what's going to happen (before it happens) and having a couple of quality solutions ready if needed.

Remember: 80% of the feedback you get will be stuff you already know, info you don't want or care about. That's OK. Your staff will feel heard and appreciated. That's a good thing! Now the best part is that other 20% ... those ideas are gold!

Next, you have your meeting and you listen to everyone share their ideas on their "best" list. This is all good and sets an uplifting tone to the meeting. Then you transition to your "worst" list. Even though many people will want to spend a lot of time here complaining, don't let them. This is not a "whining" session. You want to hear the negative, but not the emotion – just the facts.

As the leader, you want this time to be constructive so let everyone share a line or two and any details as needed. Don't forget -- in the next section of the meeting, you will spend more time talking about the negative, but solutions will be attached to the conversation. This is a much more productive way to discuss the worst areas of your tax business.

Now the best part: Changes and HOW your staff sees the best way to fix the problem. If someone has a change, but no solution to make that change happen in your tax business politely shut down the conversation and move to the next person. Anyone can say "change this" ... but if they

are not properly prepared to offer solutions at this meeting, they need to not speak at this time. [This helps train everyone else in the meeting as well.]

You must reserve most of your time for this section of the meeting. This is where the "meat" is and where the major improvement in your tax business over the next 12 months is going to come from. Why would that be, you ask?

Simple – this is where your ACTION STEPS will come from! Success is contingent on implementing great ideas! And all your great ideas are made up of a series of simple action steps. This is where the rubber meets the road! This is how you net an extra 20% on your bottom line 6 to 12 months from the date of this meeting!

I recommend having a reporter or scribe (someone taking really good notes) so you can concentrate on listening to others and facilitating the meeting. They will write down much of this info for you. However, if someone gives a change, then how to do the change – most likely you will have to ask out loud to the group, "OK -- what are the specific action steps needed to make this change happen?"

By the way, do you see how "buy in" (from your staff) takes place on implementing all of these changes in your tax business? They are saying yes to all of this because much of it was their ideas in the first place and they are giving the solutions to much of what is going to need to get done in the future, even in step-by-step order!

OK – this last part is the punch line.

You can try and fit everything in with one meeting or if you have a larger tax office with more employees, you might want to take a break and come back and finalize this section with a shorter second meeting.

I recommend you divide out all of your action items into categories and bundle them in some kind of order that makes sense for your tax business. Get yourself a chart or a spreadsheet or whatever works best for you.

Put the "Action Item" on the left, taking up 80% of the line. Then to the right of the page make two other sections entitled "Responsible" and "Date" (10% each.)

This is important. It's called Accountability.

After each Action Item (or group of action items bundled together), add a name by taking volunteers or you can assign someone most qualified to handle it. Then, once a "point person" is in place, (some action items will

have multiple people working on the project, but only one person will be held responsible) you agree to a reasonable deadline date for completion. Then in the section furthest to the right on that particular line, add the specific date.

As the owner (the leader), most of what you will be doing is following up in some kind of systematic way, making sure good progress is being made. Some tax business owners like doing this in a weekly staff meeting. Others prefer emailing every few days and then twice per month having a short personal follow up meeting. Whatever works best for you.

In the end, there must be consequences or rewards based on performance.

Everyone likes to do this part a little differently, but in my opinion – don't leave this part blank ... do something to reward quality work and penalize for work not up to par for your tax business.

Success does not have to be complicated!

You can make a major impact in your tax business next tax season if you follow this simple process.

If you have questions, let me know.

Best,

Chauncey Hutter, Jr Real Tax Business Success www.TaxMarketing.com

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<u>, </u>		

Your 100 Day Tax Biz Success Roadmap SCHEDULE

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Now Take A Break ... You Earned It!

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www.taxmarketing.com