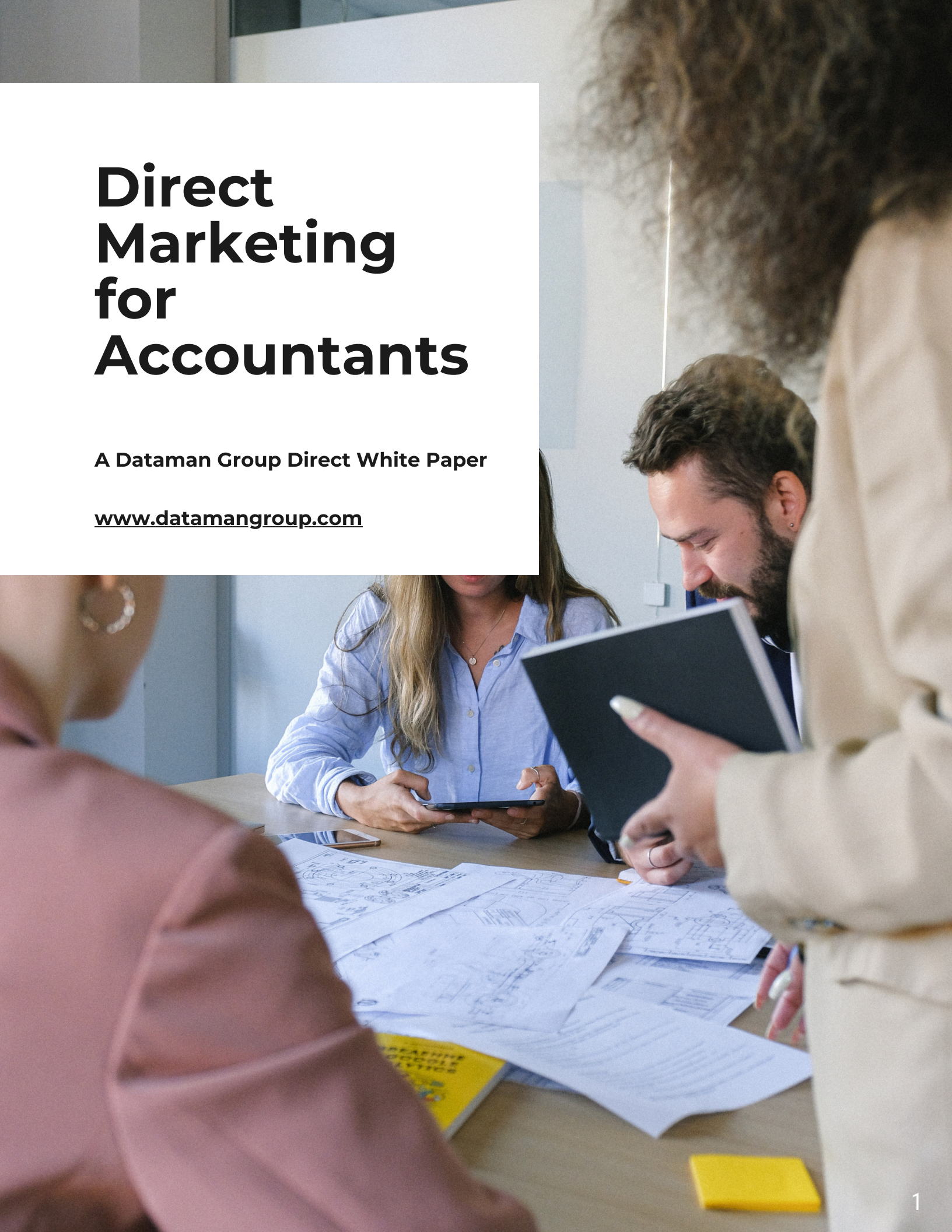


Direct Marketing for Accountants

A Dataman Group Direct White Paper

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A photograph of a person's hands using a tablet computer. The tablet screen displays a social media or website interface with various posts and images. In the background, there is a desk with a laptop, a coffee cup on a saucer, and some papers. The lighting is bright and natural, suggesting an office or home workspace.

The 3 Top Groups for Accountant Marketing

Every Accountant & Tax Professional should have a marketing budget to bring in new tax clients. Since marketing budgets are generally limited, the goal is to spend advertising dollars wisely and target the best possible prospects in the marketplace.

Since each accounting practice is unique, it is most cost-effective to target those prospects group that make the most sense.

Typically, CPAs and Accounting Firms market to Homeowners for end-of-year Tax Business, market to Businesses for year-round accounting work or to grow the Payroll segment of their business and reach out to New Businesses to develop brand-new client relationships.



**Increasing the
Residential Tax
Preparation Business**

**Growing Your
Commercial Business**

**Increasing your
Payroll Business**

New Homeowners

Top Market for Tax Prep



New Homeowners

New Homeowners who bought their homes in 2021 represent the tax preparer's single most important market group. While we all know that many families do their own taxes on-line, it is strongly recommended that New Homeowners get help with their Tax Return. New Homeowners need to hire an accountant to make sure the return is completed correctly and that their refund is maximized.

Home ownership significantly changes most people's tax situation and the deductions they are eligible for. Most New Homeowner websites recommend that New Homeowners get their taxes done professionally for their first year with an eye towards doing it themselves down the road. But we all know that New homeowners who feel that they are well-treated by their accountant will stay with them for many years.

You must reach out to these new homeowners before they make arrangements with someone else.

Select the New Homeowners in your market by zip-code.

New Businesses

Great for
Commercial
Growth

New Businesses

New Businesses are excellent prospects! They must file taxes for their new business and they need the advice of a qualified accountant who will:

- Insure a business is set up properly as a sole proprietorship, partnership, limited liability corporation, Subchapter S corporation, etc.
- Make sure a company pays its payroll taxes and other governmental obligations when they're due.
- Prepare a company to handle upcoming expenses.
- Plan ahead so there's money on hand to pay employees even when cash flow is down.
- Minimize a company's taxes.
- Explain any advantages and disadvantages of adding or laying off employees.
- Help identify which company activities are profitable and which are losing money.
- Advise on the wisdom of buying or selling property or assets.
- Serve as point person in the event of an audit.
- Be a proactive partner in helping a business grow.

In short, accountants can be valuable members of any business operation. More than just “number crunchers,” accountants can provide financial guidance, insight and advice that can help a business grow and prosper.

The single best time to develop a relationship with a business is when they are new.



Growing your Payroll Business

Prospecting for Payroll Business

Many Accounting Firms have moved to providing Payroll Services for their clients and some firms solicit Payroll Business as a way to get their foot in the door.

First, consider Small-to-medium-sized Existing Businesses

Businesses represent consistent monthly income. You can select by SIC code (Standard Industrial Code) or business category, employee size range, sales volume, as well as zip-code.

Some accounting firms specialize in particular business types and offer specific expertise in areas such as health care, education, and technology.

Other Accounting firms looking to increase the Payroll Business target businesses with 10+ employees, omitting selected business categories such as government, public schools, Fortune 1000, banks and other accounting firms.

Dataman Group Direct has developed a Specialized Payroll Prospect File, designed specifically for CPA + Accounting Firms who are looking to reach out to these prospects by mail, phone or email.



Recap

For Accounting Practices that are looking to increase their commercial business, mail to the new businesses each month.

For Practices that are looking to increase their Residential Tax Preparation business, mail to the New Homeowners 3 times: Jan 25, Feb 20 and March 25th.

For Accounting firms looking to increase their payroll business, mail quarterly.

There is business out there for the asking. The firm that proactively seeks out new business will earn it.

Direct mail, email and telemarketing are all great marketing channels.

- Stand out from the crowd
- Target market your best groups
- Use multiple media channels
- Be consistent

The pros at Dataman Group Direct will walk you through your marketing campaign needs.

Call us at (800) 771-3282 or [visit our website](#).