Chattanooga CPA Group

GROWTH AND RETENTION CLIENT ACQUISITION STRATEGIES

TEACHING TAX FLOW

MRR Institute

What’s Inside:

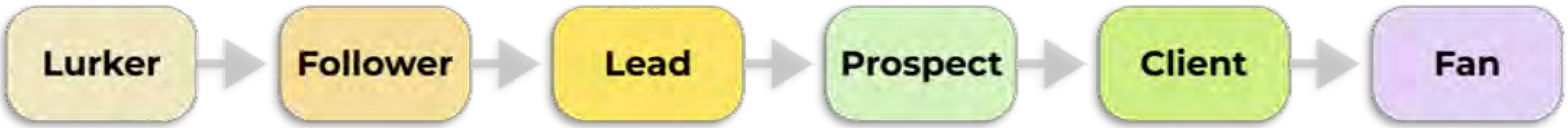
- **Presenter Introduction**
- **The Modern Contact Journey**
- **The Scalable Client Acquisition Process**
- **Nurturing Growth:** Leveraging Centers of Influence and Deepening Client Connections
- **Practitioner Tips**
- **Continue The Conversation**

Chris Picciurro, CPA, MBA, PFS, ARA

Tax Strategist • Educator • Entrepreneur • Author

- **Integrated CPA Group** Co-Founder / Executive Officer
- **Teaching Tax Flow** Founder / Educator
- **MRR Institute** Founder / Educator
- **Teaching Tax Flow Podcast** Co-Host
- **Mr. R Show** Co-Host
- **National and International Speaker**
- **"Defeating Taxes"** Author
- **Aspiring Pickleball Professional**

Modern **Contact Journey**



Modern **Contact Journey**

Lurker → Follower → Lead → Prospect → Client → Fan

Merriam-Webster Dictionary:

A person who reads messages on an Internet discussion forum or social media platform but does not contribute.

Cambridge Dictionary:

Someone who reads the messages in a chat room without taking part.

Modern **Contact Journey**

Lurker → **Follower** → Lead → Prospect → Client → Fan

Starting Points:

- Social Media Accounts (personal and business)
- Podcast
- Online Community or Group
- Virtual Events or Webinars
- Blog
- Newsletter

Modern **Contact Journey** (social media)

Lurker → **Follower** → Lead → Prospect → Client → Fan

Best for: B2B networking, sharing expertise, attracting business-owner clients, and building professional authority

Content ideas: Tax tips, articles, client wins, speaking engagements, behind-the-scenes of firm growth

Best for: Long-form educational video content and SEO

Content ideas: "How-to" tax videos, explainers on tax strategies, client Q&A sessions, webinar replays

Best for: Local business exposure, private client groups, casual educational content

Content ideas: Tax season reminders, live Q&As, link to newsletters or blogs, community involvement

Best for: Reaching younger or self-employed clients with short, engaging content

Content ideas: Quick tax tips, IRS myths debunked, storytelling about client success

Best for: Visual branding, short-form video content (Reels), client engagement

Content ideas: Day-in-the-life posts, simple tax tips, testimonials, educational carousels, meme-based education

Best for: Sharing tax updates, articles, and engaging with thought leaders (less client-focused now)

Content ideas: Real-time IRS news, threads on tax strategies, links to blog content

Modern **Contact Journey**

Lurker → Follower → **Lead** → Prospect → Client → Fan

Knowing how someone found your tax and accounting business helps you understand what is **connecting with people**, so you can focus on turning leads into prospects especially when there is a **strong chance** they will become the kind of **client you are looking for.**

- **Found** through online search
- **Followed** online
- **Knew** personally
- **Met** at an event (in person or virtual)
- **Referred** by a center of influence
- **Referred** by a client

Modern **Contact Journey**

Lurker → Follower → Lead → **Prospect** → Client → Fan

A **lead** is any potential client who enters your pipeline, but a **prospect** is a lead that meets your criteria and shows real potential for engagement.

Modern **Contact Journey**

Lurker → Follower → Lead → Prospect → **Client** → Fan

A client **is a lead** who has moved through your acquisition process, **signed** an engagement, and is now **actively receiving services** from your firm.

More than just a transaction, a client is a partner in an ongoing relationship where your firm delivers value, builds trust, and creates long-term growth through service and referrals.

TEACHING TAX FLOW

MRR Institute

Modern **Contact Journey**

Lurker → Follower → Lead → Prospect → Client → **Fan**

The E's of Firm *Fanship*
(The word Fanship is indeed Michigan State University's "Spartan Green.")

Embrace: Welcome and appreciate every client as a valued part of your firm.

Engage: Maintain meaningful, consistent, and authentic communication.

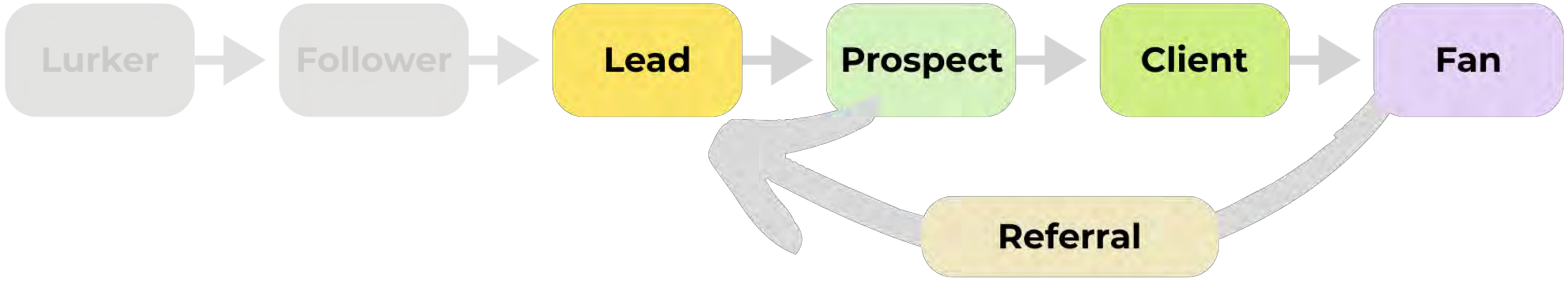
Educate: Provide value through content, insights, or tips they can benefit from and share.

Elevate: Go above and beyond expectations to create memorable moments.

Encourage: Invite and incentivize them to refer others or leave feedback.

TEACHING TAX FLOW

Modern **Contact Journey**



Automation, clarity, and defined processes **drastically shorten** the contact journey and quickly filter out leads that are not a good fit.

Poll Question:

Where do most of your best new client opportunities come from today?

A. Referrals from current clients

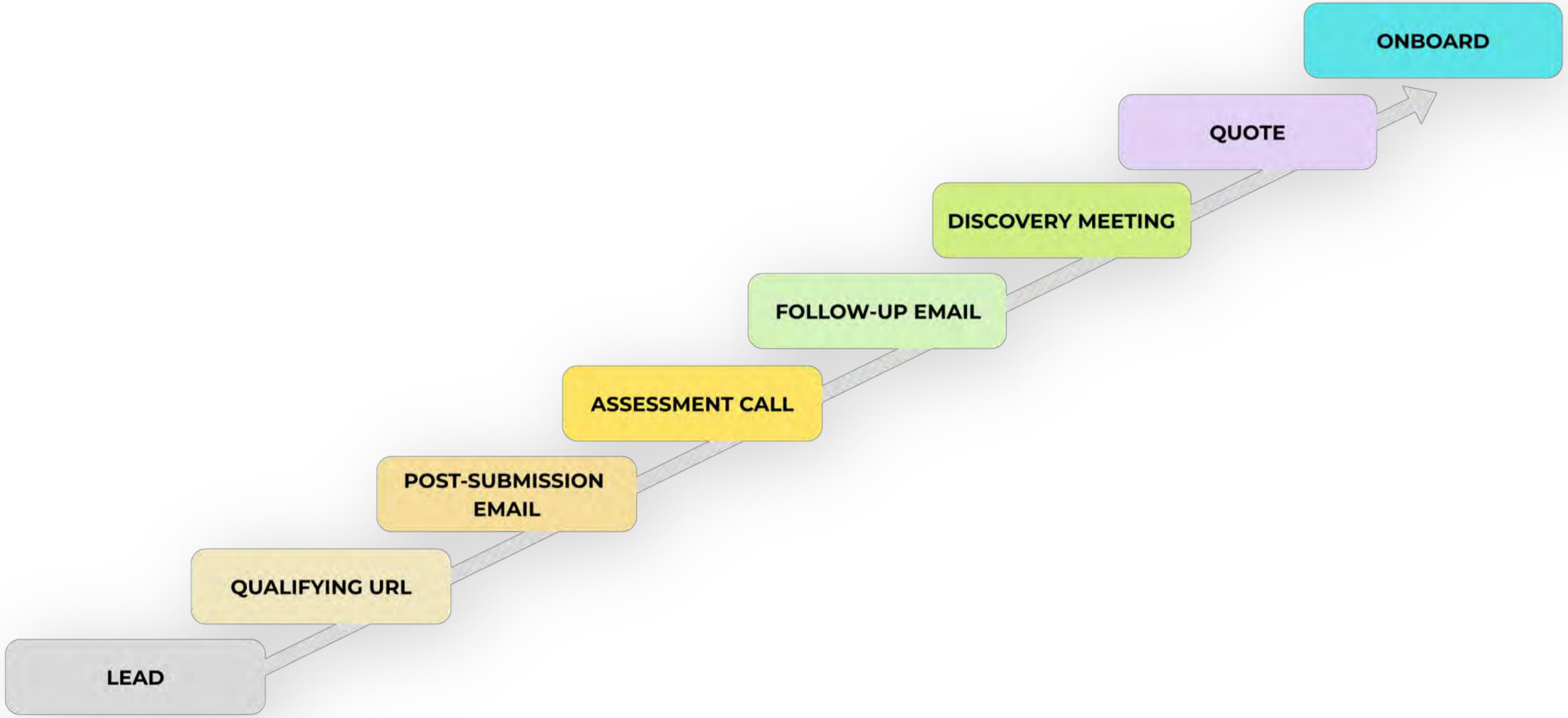
B. Referrals from centers of influence

C. Online search

D. Social media or content

E. Events, webinars, or speaking opportunities

The Scalable **Client Acquisition Process**



The Scalable **Client Acquisition Process**

LEAD → QUALIFYING URL → POST-SUBMISSION EMAIL → ASSESSMENT CALL → FOLLOW-UP EMAIL → DISCOVERY MEETING → QUOTE → ONBOARD

Leads can come from **anywhere**, by email, phone call, text message, direct message on social media, office visit, or an in-person conversation.

No matter what the source, always direct them to your qualifying URL to keep your intake process **consistent and scalable**.

The Scalable **Client Acquisition Process**

LEAD | QUALIFYING URL | POST-SUBMISSION EMAIL | ASSESSMENT CALL | FOLLOW-UP EMAIL | DISCOVERY MEETING | QUOTE | ONBOARD

Good afternoon gentlemen.

Joe - thank you for the introduction.

John - great to meet you. To help me find the best path to meet your needs, please **use this link** to answer a few questions. Establishing a solid CPA relationship is essential and can make a big difference in your tax and financial journey.

In the meantime, I **highly recommend** you use the links below to learn more about our practice:

- Teaching Tax Flow podcast
- My personal website
- Company website
- Teaching Tax Flow website
- Private tax planning Facebook group
- Teaching Tax Flow YouTube channel

Have a great day.

Christopher J. Picciurro, CPA, MBA, PFS, ARA
Executive Officer & Co-Founder, Integrated Financial Group
Co-Host of the Teaching Tax Flow & Mr. R Show podcasts
Author of Defeating Taxes - www.defeatingtaxes.com
www.chrispicciurro.com

The Scalable **Client Acquisition Process**

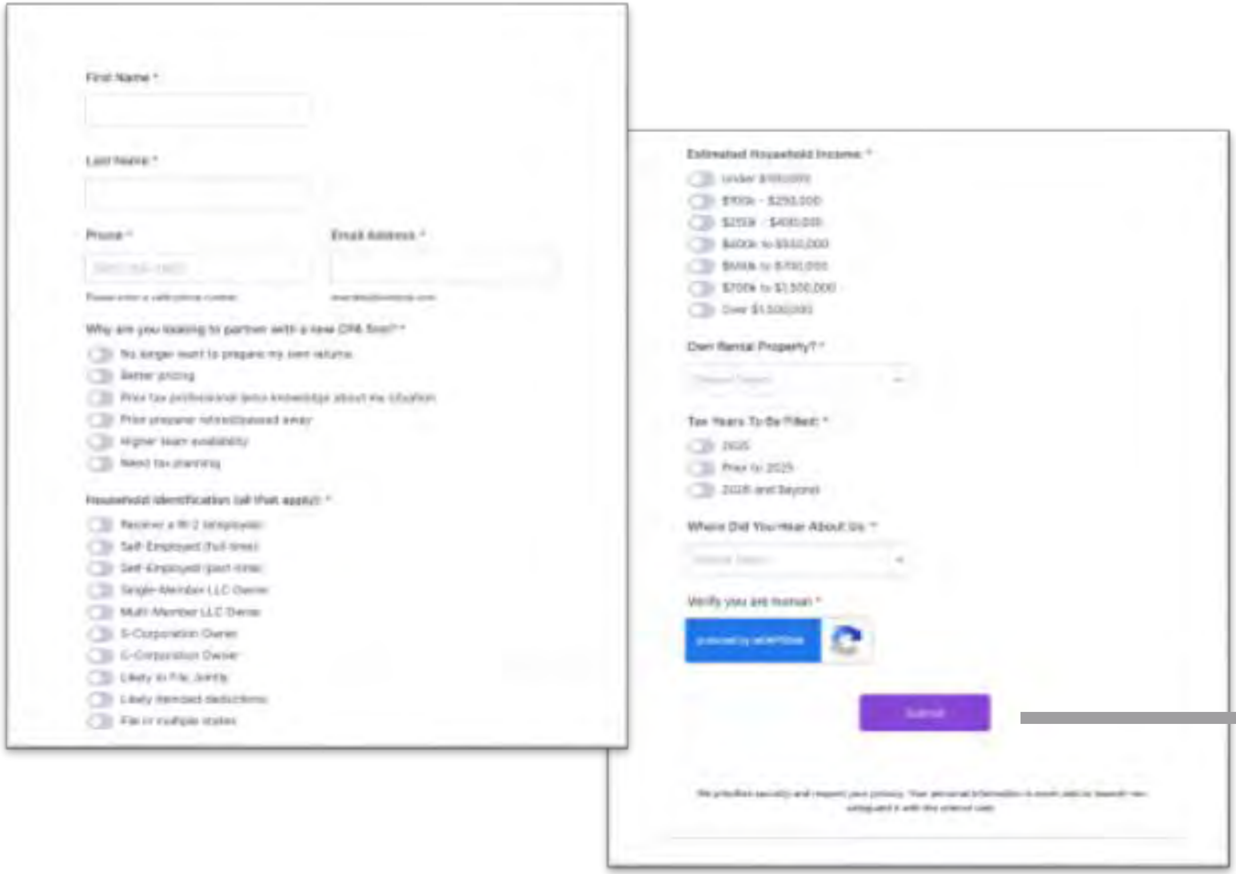
LEAD | **QUALIFYING URL** | POST-SUBMISSION EMAIL | ASSESSMENT CALL | FOLLOW-UP EMAIL | DISCOVERY MEETING | QUOTE | ONBOARD

- **Ask qualifying questions** that take less than 2 minutes to answer
- **Automation** that sends the lead directly into your CRM or database
- **Clear description of services** so leads know exactly what you offer
- **Comments section** for the lead to provide additional context or questions
- **FAQs** to address common concerns and reduce unnecessary back-and-forth
- **No immediate meeting offer** to create value and barrier
- **Niche positioning** so your ideal client feels like they are in the right place
- **Organized and easy-to-navigate layout** that builds trust and confidence

The Scalable **Client Acquisition Process**

LEAD → **QUALIFYING URL** → POST-SUBMISSION EMAIL → ASSESSMENT CALL → FOLLOW-UP EMAIL → DISCOVERY MEETING → QUOTE → ONBOARD

www.2026.tax



Automations Begins

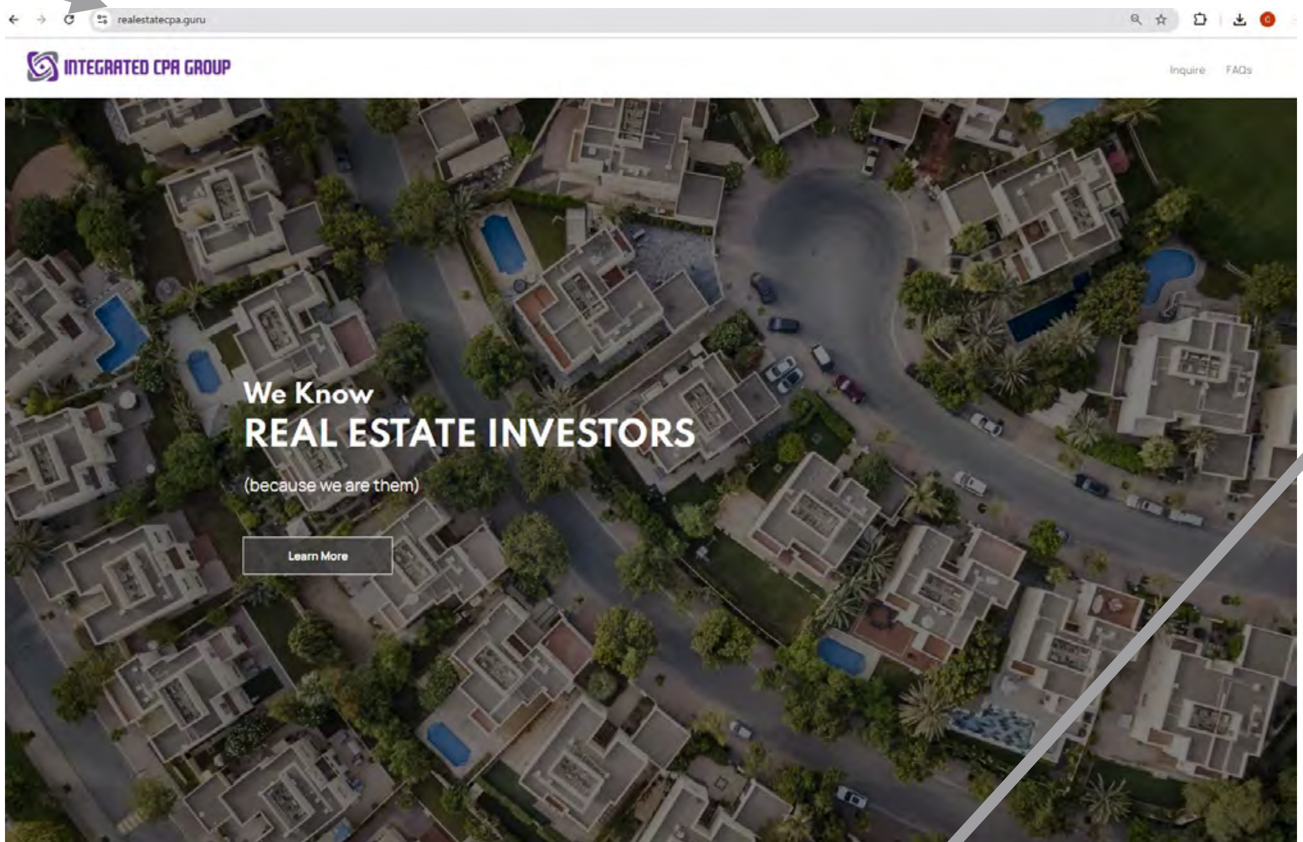
TEACHING TAX FLOW

MRR Institute

The Scalable **Client Acquisition Process**

LEAD | **QUALIFYING URL** | POST-SUBMISSION EMAIL | ASSESSMENT CALL | FOLLOW-UP EMAIL | DISCOVERY MEETING | QUOTE | ONBOARD

www.RealEstateCPA.guru



Automations Begins

The Scalable **Client Acquisition Process**

LEAD → QUALIFYING URL → **POST-SUBMISSION EMAIL** → ASSESSMENT CALL → FOLLOW-UP EMAIL → DISCOVERY MEETING → QUOTE → ONBOARD

- **Automate contact capture and email follow-up** using software
- **Call to action** that invites the lead to set up a casual chat or conversation
- **Communicate your programs and packages** to set expectations early
- **Delay initial email response** (we use a 1-hour delay and avoid sending between 6 PM and 6 AM)
- **Follow up with up to two emails** before marking it as a dead lead
- **Reinforce your firm's resources and strengths** to build credibility

The Scalable **Client Acquisition Process**

LEAD → QUALIFYING URL → **POST-SUBMISSION EMAIL** → ASSESSMENT CALL → FOLLOW-UP EMAIL → DISCOVERY MEETING → QUOTE → ONBOARD

✓ **Form Submission**

✓ **Automation (Scoring Model)**

Identification = RED

Thank you for reaching out

We appreciate you sharing your situation with us.

Hello *|FNAME|*,

Thank you so much for reaching out and sharing your situation.

Based on the information provided, we want to be respectful of your time and let you know that at this time, we are not the best fit to support your needs.

That said, we still want to support you and guide you in the right direction. If you would like a referral to a trusted professional in the Intuit tax professional community, please confirm using the link below.

Request a referral

Prefer a simple link instead of the button?
https://form.jotform.com/253076333630149

Free resources from our sister company

You are also welcome to take advantage of our Teaching Tax Flow resources:

- Teaching Tax Flow YouTube Channel
- Teaching Tax Flow Podcast
- Tax Planning Private Facebook Group

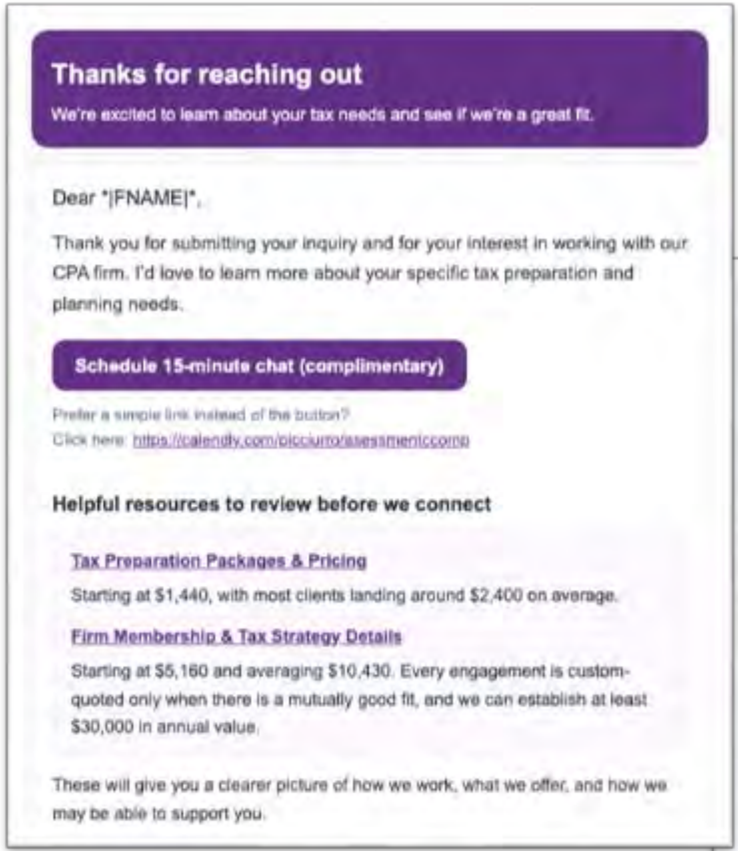
Wishing you the best, and thank you again for thinking of us,
The team at Integrated CPA Group

The Scalable **Client Acquisition Process**

LEAD → QUALIFYING URL → **POST-SUBMISSION EMAIL** → ASSESSMENT CALL → FOLLOW-UP EMAIL → DISCOVERY MEETING → QUOTE → ONBOARD

- ✓ **Form Submission**
- ✓ **Automation (Scoring Model)**

Identification = GREEN



Thanks for reaching out

We're excited to learn about your tax needs and see if we're a great fit.

Dear *|FNAME|*,

Thank you for submitting your inquiry and for your interest in working with our CPA firm. I'd love to learn more about your specific tax preparation and planning needs.

Schedule 15-minute chat (complimentary)

Prefer a simple link instead of the button?
Click here: https://calendly.com/picciurro/assessmentccomp

Helpful resources to review before we connect

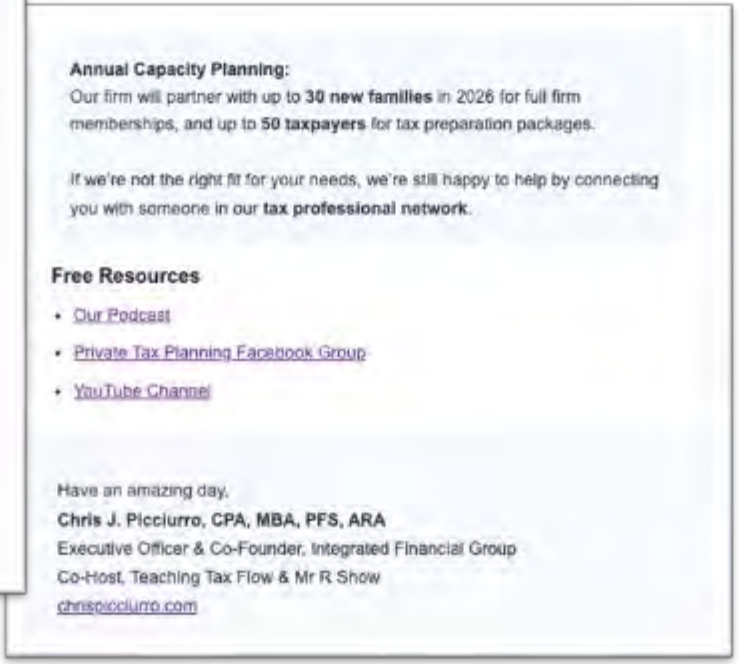
Tax Preparation Packages & Pricing

Starting at $1,440, with most clients landing around $2,400 on average.

Firm Membership & Tax Strategy Details

Starting at $5,160 and averaging $10,430. Every engagement is custom-quoted only when there is a mutually good fit, and we can establish at least $30,000 in annual value.

These will give you a clearer picture of how we work, what we offer, and how we may be able to support you.



Annual Capacity Planning:
Our firm will partner with up to **30 new families** in 2026 for full firm memberships, and up to **50 taxpayers** for tax preparation packages.

If we're not the right fit for your needs, we're still happy to help by connecting you with someone in our **tax professional network**.

Free Resources

- Our Podcast
- Private Tax Planning Facebook Group
- YouTube Channel

Have an amazing day,
Chris J. Picciurro, CPA, MBA, PFS, ARA
Executive Officer & Co-Founder, Integrated Financial Group
Co-Host, Teaching Tax Flow & Mr R Show
chrispicciurro.com

The Scalable **Client Acquisition Process**

LEAD | QUALIFYING URL | POST-SUBMISSION EMAIL | **ASSESSMENT CALL** | FOLLOW-UP EMAIL | DISCOVERY MEETING | QUOTE | ONBOARD

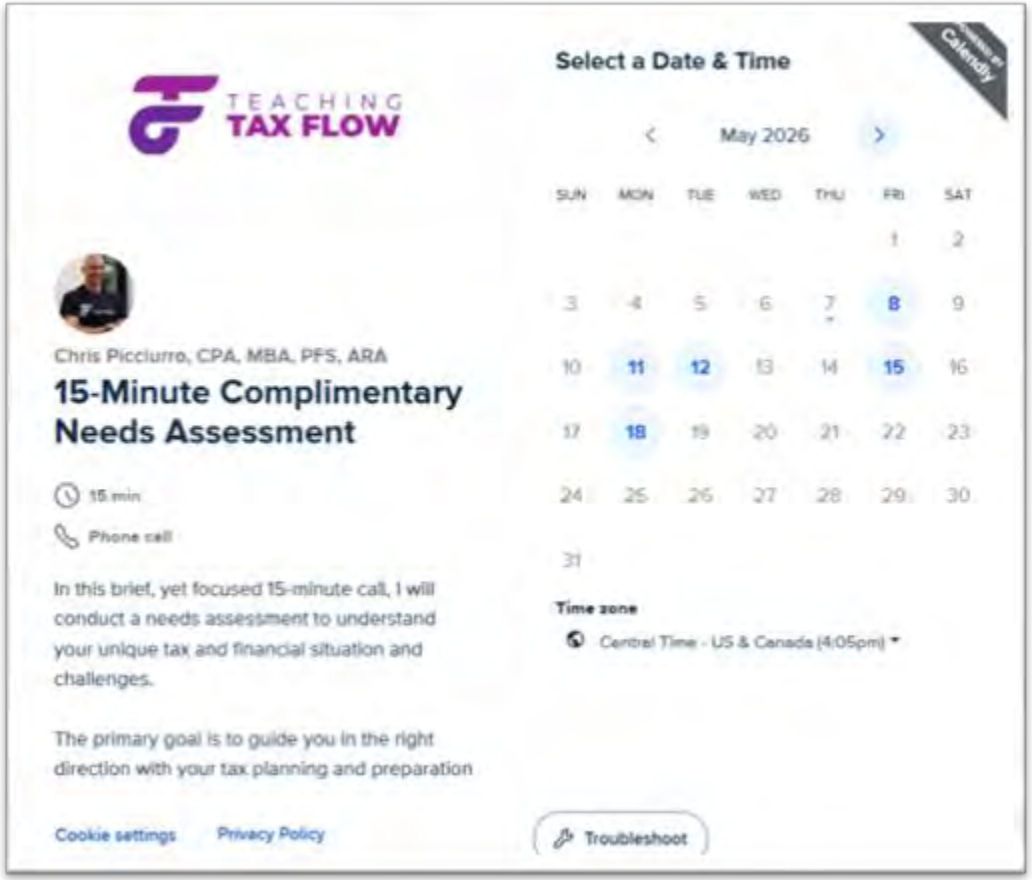
The assessment call is a critical step for any tax professional because it allows you to **take control of the conversation**, ask the right questions, and determine whether the lead is a good fit. It is your opportunity to gatekeep access to your time, set expectations, and **provide clear direction** by guiding the lead to the most appropriate service path within or outside your firm.

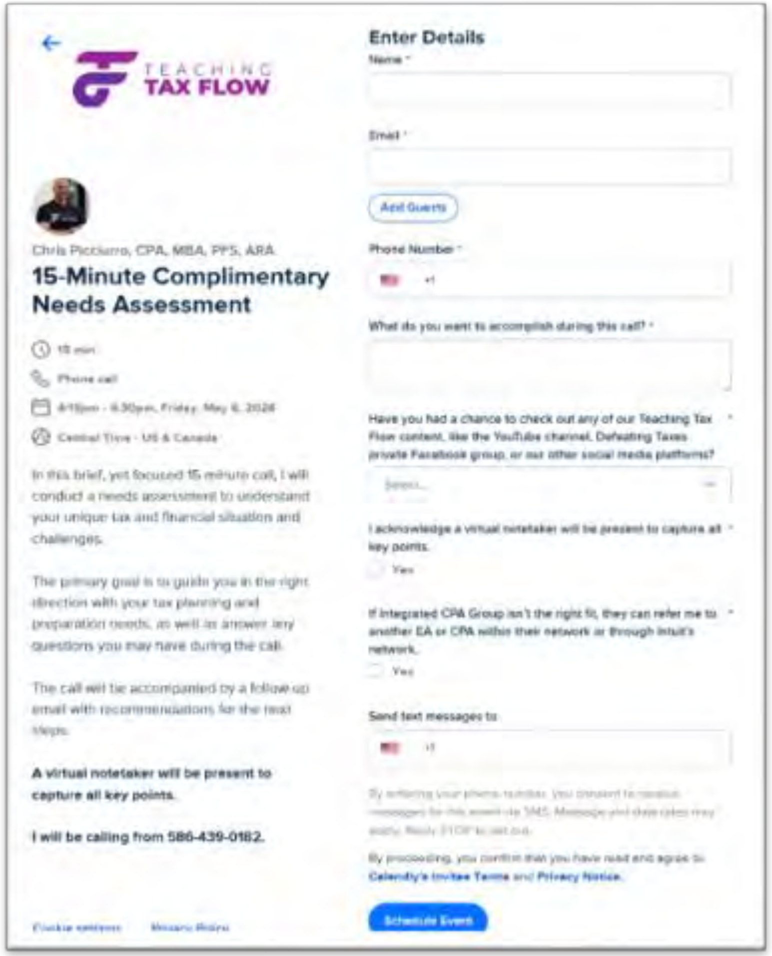
Tips:

- **Call the contact directly** rather than scheduling a meeting
- **Consider using a dedicated work number** instead of a personal mobile phone
- **Limit the call to 15 minutes** to respect your time and theirs
- **Only conduct a phone call** at this stage, not a virtual meeting
- **Use a notetaker tool** to document key points from the conversation

The Scalable **Client Acquisition Process**

LEAD → QUALIFYING URL → POST-SUBMISSION EMAIL → **ASSESSMENT CALL** → FOLLOW-UP EMAIL → DISCOVERY MEETING → QUOTE → ONBOARD





The Scalable **Client Acquisition Process**

LEAD → QUALIFYING URL → POST-SUBMISSION EMAIL → ASSESSMENT CALL → **FOLLOW-UP EMAIL** → DISCOVERY MEETING → QUOTE → ONBOARD

The follow up email **after an assessment call** is one of the most important parts of your client acquisition process. It should be sent out within 2 business days. As tax professionals, this is our chance to take a breath, **think through** what we learned on the call, and guide the lead toward the right next step.

It also helps protect our time and energy by keeping the process efficient and intentional.

The Scalable **Client Acquisition Process**

LEAD | QUALIFYING URL | POST-SUBMISSION EMAIL | ASSESSMENT CALL | **FOLLOW-UP EMAIL** | DISCOVERY MEETING | QUOTE | ONBOARD

Before jumping into a formal discovery meeting, the follow up email should offer one of three clear paths:

1. **Respectfully decline moving forward** – If the lead is not a good fit, thank them for their time, close the loop with professionalism, and refer them elsewhere if it makes sense. This keeps your reputation strong and avoids wasted follow-up.

2. **Send a quote for compliance work only** – If they are only looking for transactional services like tax return preparation, provide a clear quote and outline the next steps to engage on that limited basis.

3. **Invite them to a formal discovery meeting** – If the assessment call showed there is a need for planning, strategy, or advisory services, invite them to take the next step with a more in-depth discovery meeting where you can deliver real value.

The Scalable **Client Acquisition Process**

LEAD → QUALIFYING URL → POST-SUBMISSION EMAIL → ASSESSMENT CALL → **FOLLOW-UP EMAIL** → DISCOVERY MEETING → QUOTE → ONBOARD

Integrated CPA Group

Next Steps: Tax Preparation

Hello Liubou,

Based on our initial assessment call, the most appropriate next step is to move forward with tax preparation services, and specifically our **Comprehensive** package(s), given the complexity we discussed.

You can look over what is included in this engagement HERE. I recommend taking a few minutes to review that information, so you have a clear understanding of the scope, process, and what to expect.

For 2025, we are partnering with up to 50 families for tax preparation services. At this time, we still have some capacity remaining.

Here are your next step options:

Option 1: Reserve a Spot With ICPA

- A $500 nonrefundable reservation deposit is required per return
- The deposit is applied toward your 2025 tax preparation investment
- This secures your place in the 2025 client group

Reserve Your 2025 Spot

Option 2: Be Referred Within the Intuit® Network

- Intuit® will promptly reach out directly to begin the matching process
- This ensures you continue working with a qualified professional who can support your needs

Submit Referral Information

There is absolutely no pressure. The goal is simply to make sure you have the right support from the tax professional who matches your needs and communication style.

Please confirm your selection by clicking the appropriate option above, and we will guide you from there.

The Scalable **Client Acquisition Process**

LEAD → QUALIFYING URL → POST-SUBMISSION EMAIL → ASSESSMENT CALL → **FOLLOW-UP EMAIL** → DISCOVERY MEETING → QUOTE → ONBOARD

Integrated CPA Group

Next Step: Discovery Meeting

Hello Eric,

Thank you for taking the time to speak with me. I really enjoyed our initial assessment call and appreciated the opportunity to learn more about your situation. As discussed, the next step is a formal discovery meeting where we take a deeper look at your tax picture and determine whether a full firm membership makes sense for you. Information about a full firm membership can be found HERE.

If there is a mutual fit and we can identify at least $30,000 of annual value, a full firm membership quote will be provided. Prior to the discovery meeting, we will set up a secure client portal so you can upload your most recently filed personal and business tax returns.

If you would like to move forward, please schedule the discovery meeting using the button below.

Schedule the discovery meeting

Poll Question:

What part of your client acquisition process needs the most improvement?

A. Getting leads to complete an intake form

B. Qualifying leads before giving them time

C. Following up consistently

D. Explaining service options and pricing

E. Converting prospects into clients

The Scalable **Client Acquisition Process**

LEAD → QUALIFYING URL → POST-SUBMISSION EMAIL → ASSESSMENT CALL → FOLLOW-UP EMAIL → **DISCOVERY MEETING** → QUOTE → ONBOARD

The discovery meeting is where we go from surface-level interest to real understanding. It is our chance to dig into the lead's goals, pain points, and see if there is a true fit for a long-term relationship. This is also where we show the value of what we do beyond just compliance.

It is a 45-minute meeting focused on learning about the prospect's needs and sharing how our services can help. Once they book, our team follows up with instructions to upload prior year tax docs to a secure portal.

After the meeting, there are two main paths:

1. **Respectfully decline moving forward** – If it is not a fit, we close the loop professionally and move on.
2. **Present a formal quote** – If a good match, we deliver a quote.

The Scalable **Client Acquisition Process**

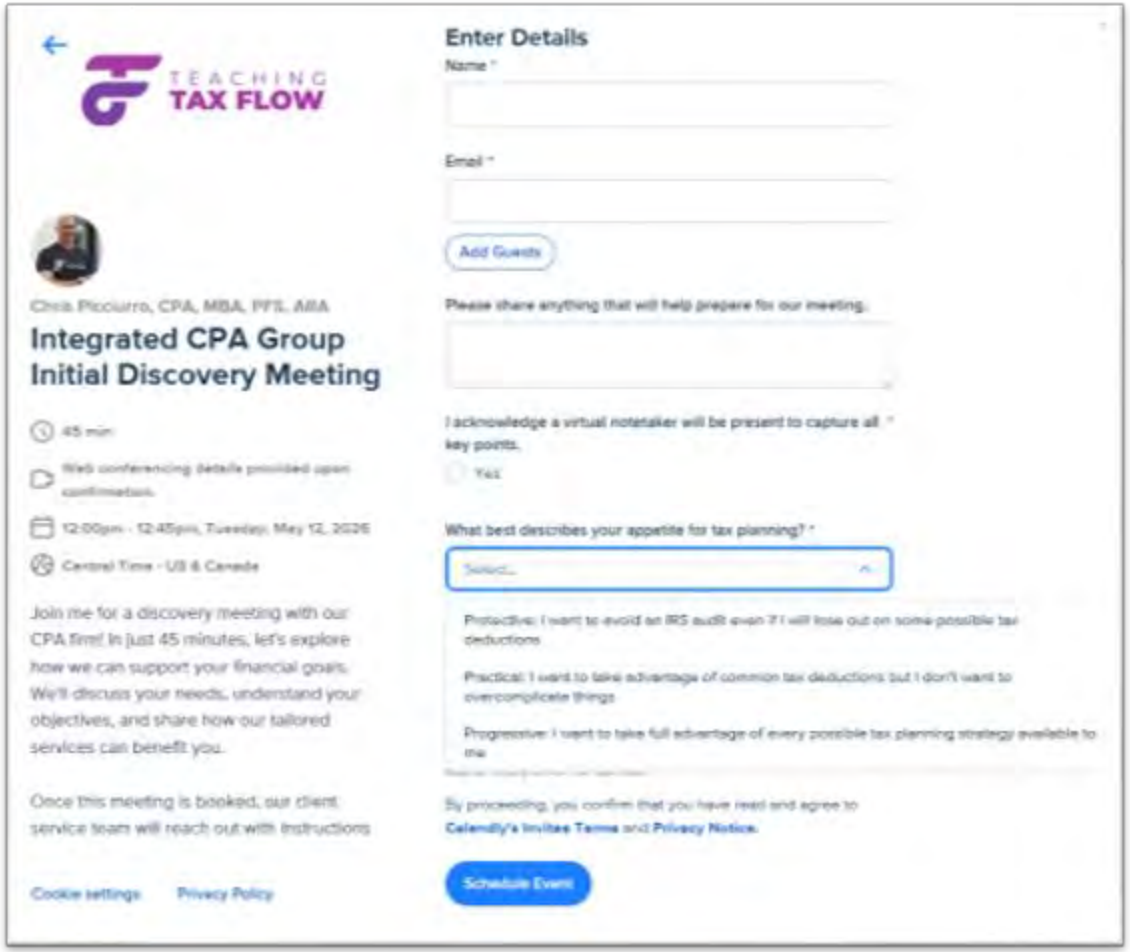
LEAD | QUALIFYING URL | POST-SUBMISSION EMAIL | ASSESSMENT CALL | FOLLOW-UP EMAIL | **DISCOVERY MEETING** | QUOTE | ONBOARD

Discovery Meeting Best Practices

- **Book the meeting** using an online calendar to streamline scheduling
- Come up with a loose script to stay focused while keeping it conversational
- Conduct the meeting as a virtual session with camera on to build rapport
- Create a secure portal for document upload before the meeting
- Listen for pain points and red flags that may affect fit or scope
- Require recently filed tax returns to have context before the call
- Use notetaking software to capture key insights and follow-up items

The Scalable **Client Acquisition Process**

LEAD | QUALIFYING URL | POST-SUBMISSION EMAIL | ASSESSMENT CALL | FOLLOW-UP EMAIL | **DISCOVERY MEETING** | QUOTE | ONBOARD



TEACHING TAX FLOW

MRR Institute

The Scalable **Client Acquisition Process**

LEAD → QUALIFYING URL → POST-SUBMISSION EMAIL → ASSESSMENT CALL → FOLLOW-UP EMAIL → DISCOVERY MEETING → **QUOTE** → ONBOARD

The quote stage is your chance to **deliver real value** by turning what you learned in the discovery meeting into a clear and tailored solution. It is not just about pricing, it is about showing how your services solve problems and support the client's goals.

Do not promise a quote to everyone who completes a discovery meeting.
Only provide one when there is a clear fit and your firm is confident in the value you can offer.

Send the quote within five business days. Include the scope, timeline, services, and investment.
A strong quote sets expectations and positions your firm as a trusted partner.

The Scalable **Client Acquisition Process**

LEAD | QUALIFYING URL | POST-SUBMISSION EMAIL | ASSESSMENT CALL | FOLLOW-UP EMAIL | DISCOVERY MEETING | **QUOTE** | ONBOARD

- Clear and firm pricing that reflects the value and scope of your services
- Communicate all items that will be delivered so there is no confusion
- Communicate your terms including payment expectations and engagement details
- Create an explanatory video to walk the prospect through the quote
- Develop a pricing tool to ensure consistency and efficiency in quotes
- Do not use round numbers in your quote as they can feel less customized
- Email a reminder before the quote expires to prompt a decision
- Have an expiration date to create urgency and keep your pipeline clean
- Include an onboarding fee to reflect the setup and planning work involved

The Scalable **Client Acquisition Process**

LEAD → QUALIFYING URL → POST-SUBMISSION EMAIL → ASSESSMENT CALL → FOLLOW-UP EMAIL → DISCOVERY MEETING → **QUOTE** → ONBOARD

From: Chris Picciurro

Subject: Assessment call follow-up for 2024 tax preparation

Good morning xxxxxxx,

Thank you for your time recently and for the valuable discussion. I appreciate the communication and the opportunity to meet with you.

As we discussed, our firm operates exclusively on a membership-based, flat-fee subscription model. While this is a non-traditional approach, it allows us to maintain open lines of communication without clients feeling like they're "on the clock." This structure enables us to focus on proactive tax planning, strategy, advising, consulting, and projections, helping you avoid surprises at tax time.

Additionally, our comprehensive membership program, the Tax Plus Program, provides full access to our services. You can find more details here: **CLICK HERE FOR DETAILS**

Please **CLICK HERE** to watch my detailed personalized quote video:

Our full firm membership will include:

Compliance:

- Starting for tax year 2025 – Personal federal income tax preparation, including up to 3 rental properties, 2 K-1s, and up to 1 state and/or local returns – xxxxxxxx
- Federal power of attorney for all personal tax returns we prepare
- Audit protection plan enrollment for all tax returns we prepare

The Scalable **Client Acquisition Process**

LEAD | QUALIFYING URL | POST-SUBMISSION EMAIL | ASSESSMENT CALL | FOLLOW-UP EMAIL | DISCOVERY MEETING | **QUOTE** | ONBOARD

Strategy & Communication:

- Starting February 1, 2026, tax planning, strategy, consulting, advising and projection meetings
- Starting February 1, 2026, access to our CPA Urgent Care service
- Starting February 1, 2026, unlimited virtual consultations regarding tax and personal financial questions
- Starting February 1, 2026, response to any email or voicemail communications within 1 business day
- Starting February 1, 2026, annual personalized tax planning with white glove implementation
- Access to our professional network including tax strategy implementation partners
- Bank communications on your behalf
- Secure client portal

Terms:

- Your tax-deductible monthly membership fee for our Tax Plus Program will be $490. That will begin on June 1, 2026.
- In addition to the monthly fee, there is a one-time tax-deductible client set up fee of $1,435. This will be also collected on June 1, 2026.
- All fees are drafted via ACH or credit care monthly
- You can cancel the engagement at any time with a 30-day notice
- Expires xxxxxx

Upon approval of our membership quote, we will send you a self-renewing engagement letter and payment authorization.

The Scalable **Client Acquisition Process**

LEAD → QUALIFYING URL → POST-SUBMISSION EMAIL → ASSESSMENT CALL → FOLLOW-UP EMAIL → DISCOVERY MEETING → **QUOTE** → ONBOARD

The Scalable **Client Acquisition Process**

LEAD → QUALIFYING URL → POST-SUBMISSION EMAIL → ASSESSMENT CALL → FOLLOW-UP EMAIL → DISCOVERY MEETING → QUOTE → **ONBOARD**

Onboarding is where the real work begins. This is our chance to set expectations, show the client we are organized, and start the relationship off right. A strong onboarding process avoids confusion and builds trust from the start.

Once the quote is accepted, we send a welcome email, collect signed engagement documents, change portal access, and outline the next steps. Use **automation** where it makes sense but keep it personal.

Make sure to clearly communicate timelines, how you will interact, what documents are needed, and how billing works. A solid onboarding process makes everything smoother down the road.

The Scalable **Client Acquisition Process**

LEAD | QUALIFYING URL | POST-SUBMISSION EMAIL | ASSESSMENT CALL | FOLLOW-UP EMAIL | DISCOVERY MEETING | QUOTE | **ONBOARD**

From: Chris Picciurro

Subject: Welcome to Our Family of Clients

Good xxxxxx xxxxx & xxxxx,

Congratulations on your membership and welcome to our family of clients! We are truly excited to partner with you and welcome you aboard. I have included our client services team, xxxxx, on this email, so everyone is connected from the start. I have also copied xxxxx, CPA who will serve as your membership relations manager and xxxx, who will be your client services specialist. xxxx will be your main point of contact for anything related to tax preparation while xxxxx will be your go to resource for administrative needs.

Next step

Our team will begin the onboarding process by sending an engagement letter and ACH payment authorization. You can sign the document electronically and send it back with the payment authorization. Please note that ACH and credit card payments will be shown on your statement as drawn from "Pilot Tax & Accounting, PC". ***Upon receipt of your payment authorization, we will process the payment for your onboarding fee.***

Your first sales receipt will be on 6/1/2026. If you need anything in the meantime, please let me know. This video reinforces our on-boarding process.

Action item - onboarding meeting

Kindly use this link to book your onboarding meeting at your earliest convenience.

Access to CPA Urgent Care

In addition, please use this link to take advantage of our ***CPA Urgent Care*** resource. This tax consulting service provides our subscribers with ***secure, confidential,*** and ***on-demand*** access to our team of CPAs and tax professionals who can address your tax matters in a brief, one-on-one session. Since these sessions are hosted on a first come, first serve basis, you will enter a virtual waiting room until a host guides you into a virtual, confidential breakout room with a tax expert. Waiting times will vary depending on the number of participants and the complexity of questions. ***CPA Urgent Care is available every Tuesday, Wednesday, and Thursday from Noon to 12:00 pm CT.***

Nurturing Growth: Leveraging Centers of Influence and Deepening Client

How Do You "Date" Your Clients?

Goal: Build long-term loyalty, deepen trust, and turn clients into fans of your firm.

Key Strategies:

- Exclusive Content
  - Monthly client-only newsletter with timely tips, tax updates, and planning strategies
  - “Behind the scenes” updates from your firm or client success stories

- Client Appreciation Events
  - Virtual Q&A sessions, webinars, or in person client mixers

- Proactive Communication
  - Reach out before tax deadlines, business milestones, or relevant legislative changes
  - Send personalized check-ins*: “How can we help you?”*

Nurturing Growth: Leveraging Centers of Influence and Deepening Client

Goal: Build a reliable referral pipeline by becoming a go-to resource for professionals who already serve your ideal clients.

Steps to Develop COIs:

- Identify the Right Partners
- Create Value-Driven Outreach
- Maintain Contact

Nurturing Growth: Leveraging Centers of Influence and Deepening Client

Identify the Right Partners

Target professionals who are trusted advisors to your ideal clients, including:

- Financial advisors (independent, broker-dealer, fee-only)
- Estate planning, business, and family law attorneys
- Insurance brokers (life, health, P&C, disability)
- Mortgage lenders and loan officers
- Residential and commercial real estate agents
- Business bankers and SBA lenders
- Fractional CFOs and outsourced controllers
- Bookkeepers and accounting service providers
- Payroll and HR solution providers
- Business coaches and EOS implementers
- Retirement plan administrators
- Startup consultants and venture capital advisors

Nurturing Growth: Leveraging Centers of Influence and Deepening Client

Create Value-Driven Outreach:

- Launch a COI-only newsletter with tax updates, planning insights, and collaboration opportunities
- Host webinars or live panels featuring COIs to share knowledge and cross-promote

Maintain Contact:

- Schedule recurring outreach: coffee meetings, Zoom check-ins, or phone calls
- Sharing mutual client wins or insights (with permission) to reinforce value and trust

Poll Question:

What is your biggest opportunity to improve client retention and referrals?

A. More proactive client communication

B. Better onboarding

C. More client education

D. Stronger relationships with centers of influence

E. Asking for referrals more consistently

Top Tips for Tax Firm Owners to

Improve Client Acquisition and Retention

Mental Shifts – Upgrade Your Mindset for Growth

These are the mindset changes that drive long-term success.

Without these, task-based improvements won’t stick.

- **Evolve or Erode:** Your firm is either moving forward or falling behind. Continuously improve or get left behind.
- **When or Win?** Stop asking when a prospect will say yes and start asking how you can win the right clients.
- **Plant seeds instead of moving crops:** Focus on building long-term relationships rather than constantly chasing the next deal.
- **Position yourself as a specialist:** Be known for something. A clear niche attracts better clients and referrals.
- **Set expectations early and often:** Own the communication. Confident professionals tell clients what comes next and when.
- **Nurture your client base:** Clients who feel cared for stick around and bring others with them

Top Tips for Tax Firm Owners to

Improve Client Acquisition and Retention

Task-Based Improvements – Build a Scalable Acquisition Machine

- **Clarify your process:** Map every step from lead to client to referral. Keep it consistent and documented.
- **Create clear pricing and service packages:** Make it easy for clients to understand what they get and what it costs.
- **Use a CRM to track leads and communication:** Manage every interaction and know where each contact stands.
- **Develop automations that save time:** Automate routine tasks like scheduling, onboarding, and follow-up emails.
- **Track conversions through each stage:** Know your numbers, leads to prospects, prospects to clients.
- **Ask for feedback and referrals:** Systematically gather input and make it easy for happy clients to refer others.
- **Regularly review and refine:** Adjust your approach based on what is working and where there are drop-offs. It's a problem until there is a process.

Continue The Conversation

Explore The Community

Defeating Taxes

Thank You!