

# Case Study

## The Situation:

### Late Breaking Tax Changes

It is late December and just before the holidays, a **massive tax bill** is pushed through Congress. The **law changes** are made **retroactive to the beginning of the year** - and this is the 4th time in the last 4 years that you've been in this situation.

### Key Tools & Solutions

With ongoing digital news and updated videos created to inform your audience of law changes, you save time and meet your Clients expectations.

[www.PracticePanda.com](http://www.PracticePanda.com)

## THE COMMUNICATION PROBLEM



### How do you

- Keep your client's from flooding your office with questions?
- Balance your time, when instead of doing the work you are answering phone calls and emails?
- Clarify the glowing errors being made by the major media outlets as they oversimplify these changes to a non-tax savvy public?
- Help your clients move beyond what the law change is and move them towards how it impacts your clients and how they can take advantage of the changes?

## THE NEED



- To meet your client's expectations to **keep clients informed of changes in a timely manner**. Your clients expect you to inform them about how the law will impact their situation.
- Have a prepared and effective mass **communication tool that will be seen, read, and understood**.
- To minimize the time spent talking about the change, so that you can **maximize your time spent understanding and implementing the changes**.



## THE PRACTICE PANDA SOLUTION

### Ongoing Digital News

You use Practice Panda's **weekly tax tips**, **targeted communication**, and leverage our **ad-hoc client communication tools** to easily keep your clients up to date.

#### BENEFITS:

- You send **Weekly Tax Tips** with key topics impacting your clients in a meaningful, easy to understand format.
- You have sublists of your clients in Practice Panda, and send **targeted messages** using the **Business News**, **Monthly Digital Newsletter**, and the **Tax Planning Digital News** - retiree clients, business clients, high net worth clients, and clients with children - to each group about how the change will impact them specifically.
- You pull content from the Practice Panda **library** or create your own updates regarding the new law and have them **automatically** posted to your social media accounts, website, text service, and email.

### Video Service



When law changes happen, a **new video with your firm's branding summarizing the change** is ready to post on your website and proactively email to your clients.

#### BENEFITS:

- Reduce time spent answering the same questions over and over.
- Save time knowing that revisions of the video will continue to be available to you as the law is clarified.