PracticePanda

ELEVATE YOUR PRACTICE. SIMPLIFY YOUR LIFE.

Case Study

The Situation:

Unexpected Tax Payments and Upset Clients

In April, after a long day wrapping up ten tax returns, you get hit with frantic calls and emails from **upset clients who are blaming you for unexpected tax payments**. One of your top clients, who has several rental properties had sold one without talking to you first, and is angry about the tax bill demanding you fix it or they'll take their business elsewhere. Another client is in tears over a tax bill they didn't expect, due to not realizing they would miss out on child credits and to not withholding enough from their new job which they didn't consult you with, while yet another client is grilling you with questions and sounding like they think it's your fault.

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THE COMMUNICATION PROBLEM

How do you

- Get ahead of these situations so that the client understands what is coming, instead of having unpleasant conversations about an unexpected tax bill after it happens?
- Meet your client's expectations without having to teach everyone the tax code? Since this is why they hire you - to know the tax code so they don't have to.
- Communicate with clients about how the tax codes impact them without the content being boring or hard to relate to?

THE NEED

Pro-active client communication encourages clients to ask for your help ahead of time - It does not need to teach them the tax law. They hired you to know the law so they don't have to, and AI is not able to explain tax code impacts in the way your clients need. Proper communication about taxes needs to be **interesting and easily understood** by everyday people dripping out **awareness of key situations throughout the year** so that you can get ahead of potential problems.

THE PRACTICE PANDA SOLUTION

Provide Pro-Active And Interesting Content Throughout The Year

BENEFITS:

- **Monthly digital newsletter** sent to your clients once a month containing six articles with a variety of topics that appeal to the entire client household with the goal of everyone opening your email and reading part of your content. This keeps you top of mind and the communication ongoing, making it more likely for clients to ask you questions during the year as they pop up, and helps to build tax awareness for the non-pro.
- **Video library** with each video under 3 minutes focusing on what clients need to know. From breaking down confusing tax concepts into simpler terms to helping clients determine when to call you, the format is approachable and has a direct link to your firm at the end of each video.
- **Other Content Services** like digital Business News, Tax Planning News and a full library of articles to distribute content on specific areas that fit your firm's needs.

Content That Helps Your Client Know When To Ask For Your Advice.

BENEFITS:

The goal over time is to **help clients understand when to contact you for advice and clarification.** Practice Panda works hard to say things in a way that is easily understood. Instead of sharing jargon and numbers that are unrelatable, with **our content 3:30:3 rule** you will have access to valuable topics that **draw clients into your message in a meaningful way** whether a client spends 3 seconds, 30 seconds or 3 minutes consuming your content.