

**HOW TO  
LEVERAGE  
TEXT  
MESSAGING  
AT YOUR  
FIRM**

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If you have clients who are not in a traditional office environment, e.g., construction, manufacturing, restaurants, doctors, etc., consider implementing a text-message plan to help keep them informed.

Before you begin, strategize a plan for the announcement, content, and timing. Inform clients about the type of text messages they can expect to receive. Start by outlining the process on a web page and in an email to clients. Also, consider a brief welcome text message using this formula Text [keyword] to [shortcode] for [offer]. Example: Text “AcctRules” to 5551212 for tax tips, reminders, and important updates.

#### Getting Opt-Ins

This article from [SimpleTexting](#) outlines a great plan to gain opt-ins for new subscribers, including promoting it on social media and Google AdWords, including an opt-in checkbox on client intake forms, and more.

#### What to Send

Clients want useful information, rather than generic information, from your firm. Here are some items to consider:

- Employment taxes;
- Information returns;

## How to Leverage Text Messaging at Your Accounting Firm

- Tax requirements;
- Independent contractor responsibilities;
- Quarterly estimated tax payments;
- Tips about increasing business efficiencies;
- Regulatory updates in client industries;
- Links to videos or podcast tips that address common pain points; and
- New services your firm is offering.

Using a text-messaging service is a great way to budget and stick to the plan. In January, Comparakeet released the "[Best Text Message Marketing Services 2017](#)". Check out the list to get an idea of the service offerings, pricing, and media sharing abilities.

Tax season is approaching quickly. Why not leverage a text message campaign to help keep clients informed, you on track, and communication flowing?