One Big Media Company

GOHIGHLEVEL SNAPSHOT · TAX & ACCOUNTING FIRMS

Tax & Accounting Agency Sales Kit

Pitch, outreach, pricing and onboarding to land and keep clients in this niche.

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THE OPPORTUNITY

Selling to tax & accounting

Your buyer: A tax preparation, CPA, or enrolled agent firm with one to twenty staff serving individuals, self-employed clients, and small businesses. Their year is a crunch from January to April and again before the October extension deadline, and they want steadier revenue from bookkeeping, planning, and advisory work the rest of the year.

Why they buy:

- Your team spends tax season chasing W-2s, 1099s, and missing forms by phone
- Prospects call during the rush, get voicemail, and book with another preparer
- Engagement letters sit unsigned while your preparation calendar fills up
- Clients disappear after April, and planning and bookkeeping revenue never materializes
- Last year's clients don't rebook early, so January starts with an empty calendar

Suggested resale pricing

Setup fee	Monthly
$500-$1,500	$297-$697

Sell in Q4 so the system is live for January. Consider higher monthly fees from January to April and include year-round campaign management to keep the account through the off-season.

Sell before January: the firm feels the document-chasing pain every season, so lead with workflow 21 and early-bird rebooking. Retain the account year-round by running mid-year planning check-ins, extension follow-up, and bookkeeping campaigns, and by reporting documents completed and clients rebooked.

CLOSE

Pitch script

How much of your team's time last February went to chasing clients for W-2s, 1099s, and that one missing K-1? For most firms, it's a big chunk of the season. We install a system built for tax and accounting firms. When a client engages, they get a clear document checklist pointing them to your secure portal, followed by automatic reminders until their file is complete, so your staff stops making those calls. If someone still isn't ready close to the deadline, it flags them for an extension conversation. New inquiries get a prompt reply even during the rush, and last year's clients get invited to book early-bird appointments before January gets busy. After April, it keeps working with mid-year planning check-ins and bookkeeping offers, so revenue doesn't drop off for eight months. It never asks for SSNs or documents by text. Could we set up fifteen minutes to see it before the season starts?

Cold email

Subject: Chasing documents this season

Hi {first name},

How many hours did your team spend last season chasing clients for missing W-2s and 1099s?

We set up a system for tax and accounting firms that sends each client a secure-portal document checklist, reminds them automatically until their file is complete, and flags anyone who may need an extension.

It also rebooks last year's clients before January and runs mid-year planning check-ins so revenue continues after April.

It never asks for SSNs or documents by text.

Worth a 15-minute look before the season starts?

{your name}

Cold SMS

Hi {first name}, it's {your name}. I help tax firms automate document chasing and rebook last year's clients before January. Worth a quick 15-min look? Reply STOP to opt out.

Social DM

Hi {first name}, I build automation for tax and accounting firms: document reminders that point clients to your portal, early-bird rebooking, and mid-year planning check-ins. Open to a quick demo?

DELIVER

Offers & onboarding

Offer ideas for the client

- Early-bird tax season appointments for returning clients
- Free mid-year tax planning check-in for individuals and business owners
- Bookkeeping cleanup package for businesses with messy books before tax season
- S-Corp election review for growing sole proprietors and LLCs
- IRS notice review for people who received a letter and don't know what it means

Client onboarding checklist

- Collect: logo, brand colors, business hours, service area, Google review link
- Get access: domain/DNS, Google Business Profile manager, Facebook/Instagram admin
- Phone: buy or port a number, register A2P 10DLC, set up call forwarding
- Import the customer list (CSV) and tag it for the reactivation campaign
- Fill in the 20 custom values and publish the workflows
- Run a live test: submit the form, miss a call, book an appointment
- Book a 30-day results review with the client

KPIs to report monthly

- **Speed to first contact**: Reply to every new inquiry in under 5 minutes during business hours, even in peak season
- **Consultation-to-engagement rate**: Grow the share of consultations that sign an engagement letter each season
- **Days to complete documents**: Shorten the average time from Documents Requested to Documents Status = Complete
- **Returning client rebook rate**: Rebook most of last year's clients before February with workflows 14 and 20
- **Off-season engagements**: Book planning check-ins and bookkeeping engagements every month from May to December
- **New Google reviews**: Earn new reviews each week of filing season

General guidance only. This is not legal, tax, medical or financial advice. Results depend on your offer, market and execution.