

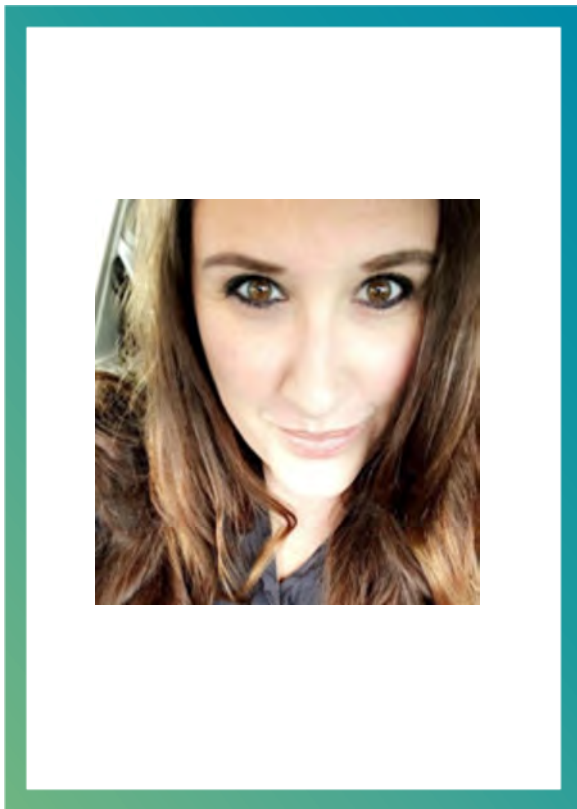


TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

TaxCaddy: Best Practices for Maximizing Client Adoption

Kristen Coleman
Advertising Coordinator

Tal Bjoraker
Lead UX/UI Designer



Kristen Coleman

Kristen Coleman joined the SurePrep team in March 2019 as Advertising Coordinator. In this role, Kristen works to promote SurePrep solutions across a range of outlets to increase brand awareness, educate clients and prospects, and maintain visibility in the tax and accounting space.

She has over 20 years of experience utilizing multi-channel marketing and advertising strategies incorporating organic and paid search, social media, trade shows, direct mail and email campaigns, press releases, webinars, whitepapers, website optimization and SEO, content creation, event planning and logistics for firms in various industries.

Kristen earned Bachelor of Arts degrees in History and Psychology with a Minor in Political Science from Chapman University (Magna cum Laude) in 2004.



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Tal Bjoraker

Tal Bjoraker is the Lead UX/UI Designer at SurePrep. Tal joined the SurePrep team in 2018 and leads the design efforts on multiple projects from the initial phase through completion of the designs. This includes conducting user research and testing, developing wireframes and user flows, and collaborating with other designers and developers to create intuitive, user-friendly software.

Tal is a graduate of Cal State University, Fullerton and has four years of experience in User Experience and User Interface related fields.



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Agenda

- TaxCaddy: In a category all its own
- Encouraging taxpayers to embrace TaxCaddy
- Developing a marketing plan
- TaxCaddy marketing resources
- Custom firm branding: Demo & best practices
- Examples of clients' social media & other marketing efforts
- Client support experience (taxpayer perspective)



TaxCaddy: In a Category All Its Own

TaxCaddy is NOT a portal, electronic organizer, or document management system.

- So what *IS* TaxCaddy?
- TaxCaddy is a Smart Taxpayer Collaboration Platform designed to streamline the gathering and delivery of tax documents, e-signatures, tax returns and even invoices.
- Smart Links can even automatically retrieve source documents the day they're issued from 300+ financial institutions.



Encouraging Clients to Embrace TaxCaddy

- You're already aware of the benefits of TaxCaddy and are using it to streamline the gathering and delivery of 1040 source documents
- Your goal: to increase client adoption and improve the 1040 tax return preparation process for your tax team and your clients



Encouraging Clients to Embrace TaxCaddy

- Your clients look to you as a trusted advisor to help them navigate the complex and ever changing world of taxes.
- Offering a convenient mobile solution reinforces that status, and thousands of satisfied taxpayers agree.
- Here are some quotes* from happy users of TaxCaddy to give you an idea of the experience your clients can expect.

*Authenticated by TechValidate, an independent third-party survey provider



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Encouraging Clients to Embrace TaxCaddy

TAXCADDY CUSTOMER SATISFACTION RATING

A user of TaxCaddy would be very likely to recommend for this reason:

“TaxCaddy is easy to use. I didn't have to make physical copies for my tax pro; just a quick photo of each document, send, and I was done. Very easy and I do look forward to using it next year!

Source: A user of TaxCaddy

Validated Published: Jul. 19, 2019 TVID: BE6-997-A6C

TAXCADDY TechValidate

Based on 4 responses (1 to file a question, 1 to a question, 1 to a question, 1 to a question) TaxCaddy

TAXCADDY CUSTOMER TESTIMONIAL

“It took far less time to get documents to the tax preparer and for her to prepare our return. So we were able to file earlier and at a more convenient time for us. It saved so much time previously spent in gathering and sending documents to our tax preparer and it was EASY.

— A user of TaxCaddy

Source: A user of TaxCaddy

Validated Published: Aug. 23, 2019 TVID: FD1-F62-992

TAXCADDY TechValidate



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Encouraging Clients to Embrace TaxCaddy

TAXCADDY CUSTOMER TESTIMONIAL

A user of TaxCaddy would be very likely to recommend for this reason:

“ It was enormously convenient to use simplifying document transfer and communication. Much easier and took way less time. Keeps track of responses so you know exactly where you are.



Source: A user of TaxCaddy
Validated Published: Aug. 23, 2019 TVID: BEC-84F-418
TAXCADDY TechValidate

TAXCADDY CUSTOMER TESTIMONIAL

“ Although I did not measure it and it was my first user experience with TaxCaddy, I sensed that I spent much less time on completing the questionnaire via TaxCaddy than last year via e-questionnaire. I also liked that my tax professional could be tracking my progress and we could resolve any question almost instantly. Overall, it was a very good user experience and I would like to use TaxCaddy next year.

— Igor Boldyrev, a user of TaxCaddy

Source: Igor Boldyrev, a user of TaxCaddy
Validated Published: Aug. 23, 2019 TVID: BEC-78C-00C
TAXCADDY TechValidate



Developing a Marketing Plan

- Step One: Decide which clients to invite
- Step Two: Launch an awareness campaign
- Step Three: Send invitations



Developing a Marketing Plan – Step One

- Most firms take one of two approaches when deciding who to invite:
 1. Try to predict participation based on a variety of factors including demographics
 - The adoption rate for this subset of clients can be relatively high, however, can preclude firms from getting the highest participation among their overall client base
 2. Invite all clients
 - Achieve around 40-50% adoption in year one, with additional clients joining in subsequent tax seasons



Developing a Marketing Plan – Step One

- Most firms take one of two approaches when deciding who to invite:
 - SurePrep recommends inviting all clients
 - Many firms assume older clients may be less interested in technology offerings
 - In our experience, *all clients* increasingly want mobile options and to minimize the inconveniences inherent in providing source documents the old-fashioned way
 - Offline accounts allow you to maintain the same process and platform, even for clients who choose not to use TaxCaddy



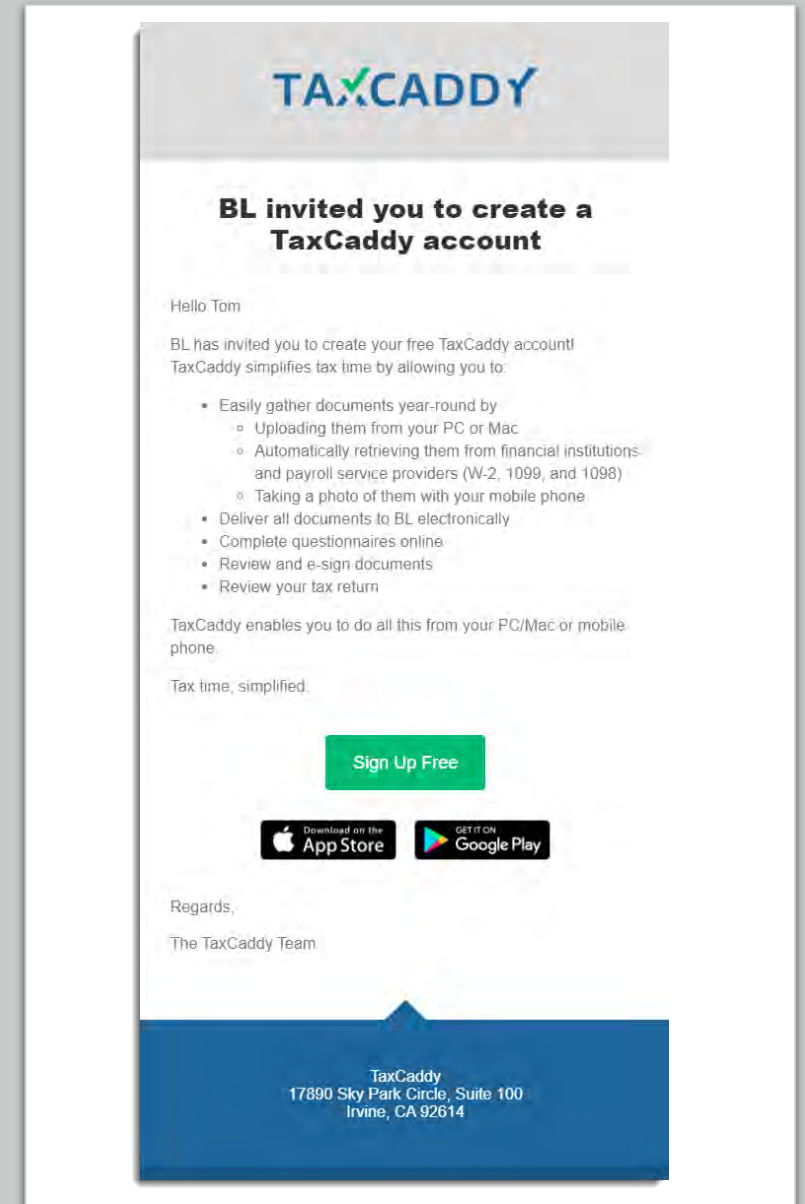
Developing a Marketing Plan – Step Two

- Launch an awareness campaign
 - Letters/emails (1-3) should be sent to clients prior to the official TaxCaddy invitation
 - Social media posts to increase exposure and create buzz
 - Include: Taxpayer Testimonials, TaxCaddy feature videos, and TaxCaddy.com



Developing a Marketing Plan – Step Three

- Invite clients to use TaxCaddy!
- The invitation that's sent via TaxCaddy:
 - Is TaxCaddy branded, but populated with your firm name and the names of individual taxpayers
 - Reiterates the benefits to the client
 - Offers a link to signup
 - Includes links to both the App Store for iOS users and Google Play for Android users

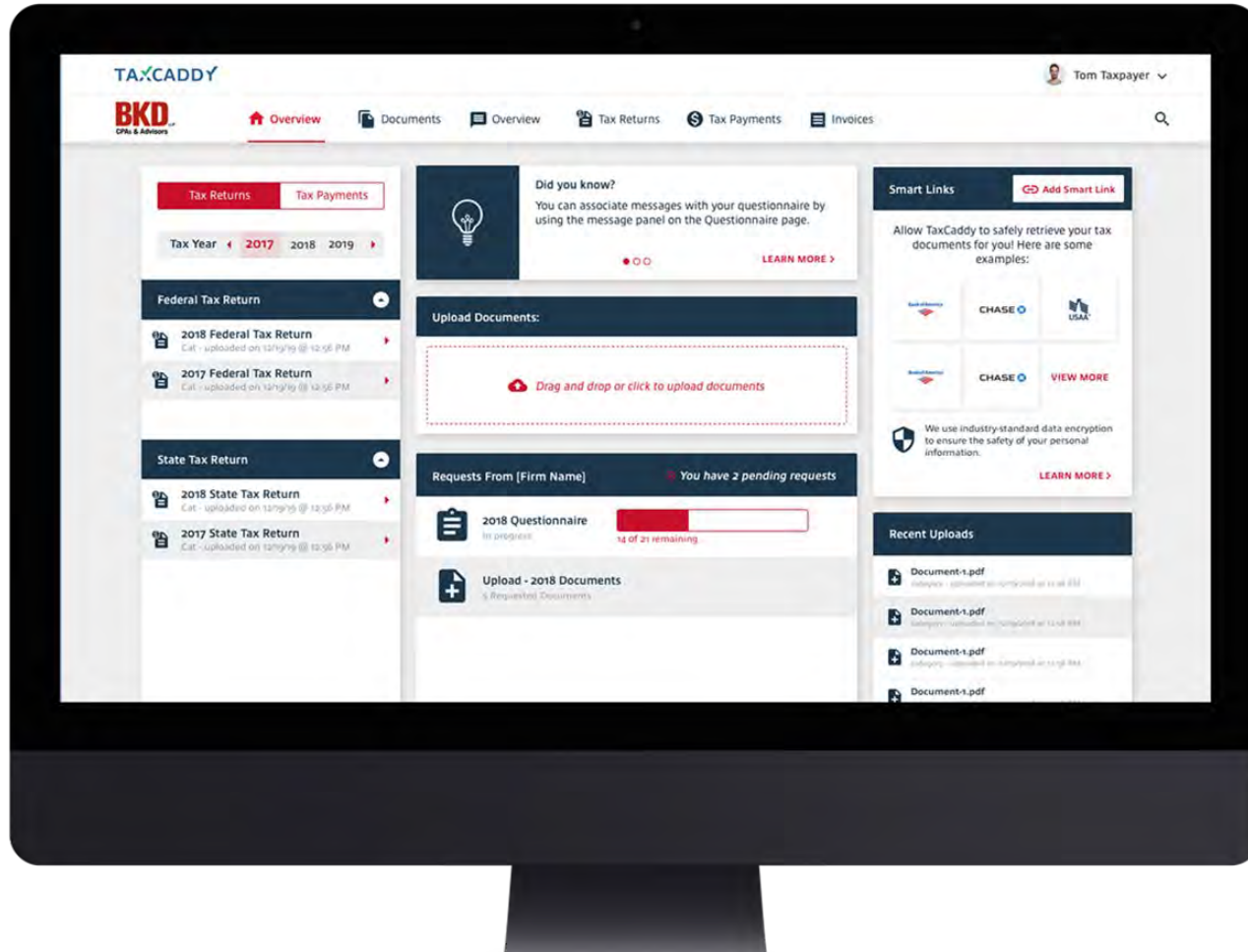


TaxCaddy Marketing Resources

- Printable brochures (TaxCaddy & Co-Branded)
- Videos
- Taxpayer reviews
- TaxCaddy.com
- Logos
- Social media messages
- Email & letter templates
- Style guide
- Taxpayer overview
- Custom branding in the app

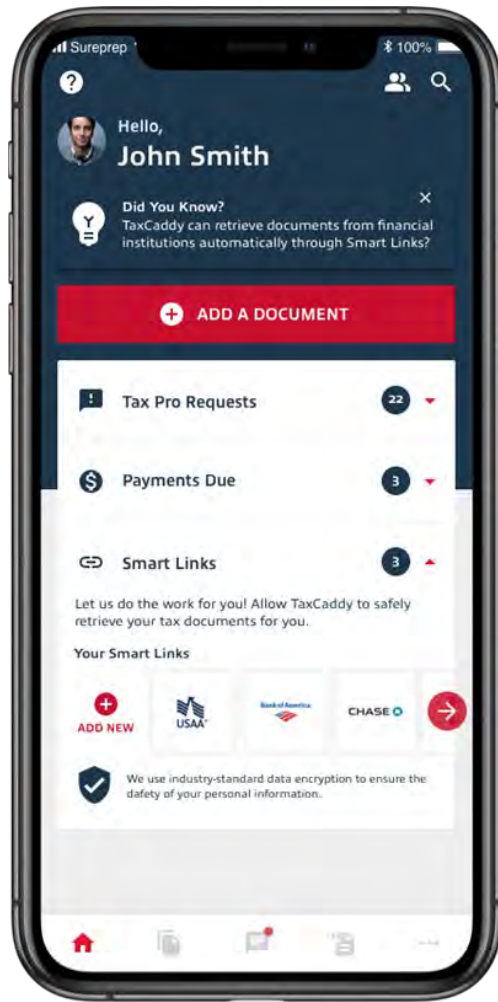


What is Custom Firm Branding?



- Custom Firm Branding is a brand new feature from TaxCaddy that will allow Firms to plug their own unique color scheme into the TaxCaddy interface on both the web and mobile platforms.

Why Did TaxCaddy Create This Feature?

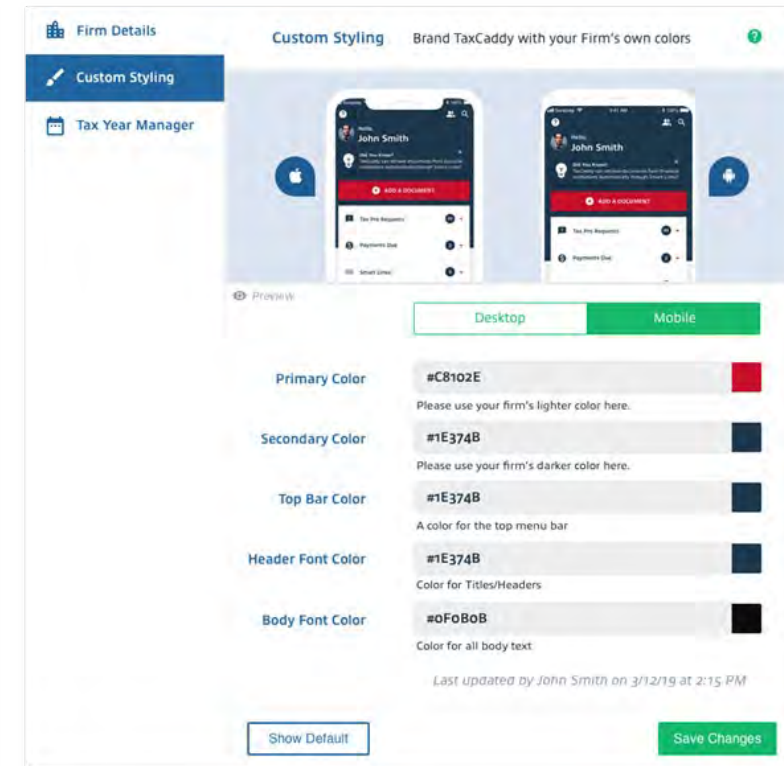
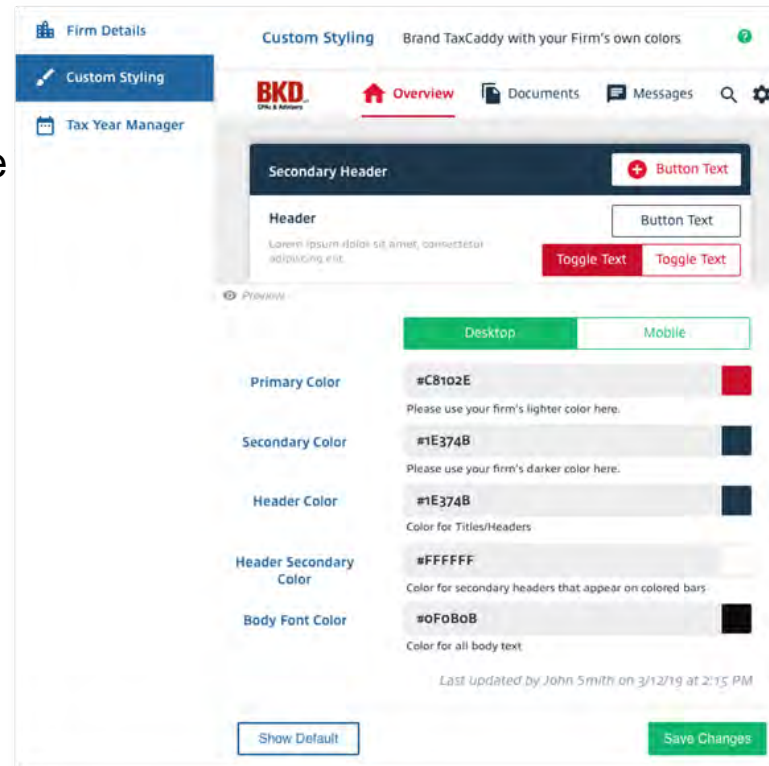


- Enhance the user experience of both the firm and taxpayers
- User will see the connected firm's logo and color scheme throughout the application
- A more tailored and personal experience



How Do You Use It?

- Admin user logs in to TaxCaddy.
- Navigate to “Firm Details.”
- Upload your Firm’s logo. Make sure to have a high quality version; PNG is recommended.
- Set both web and mobile colors by entering hex codes into the different custom fields.
- Consult preview to make sure everything looks correct.
- Save changes.



How To Set Up Your Colors

- Reference your Firm's brand book/guidelines.
- Make sure to have the exact 6 digit hex codes.
- Follow the instructions underneath each field.

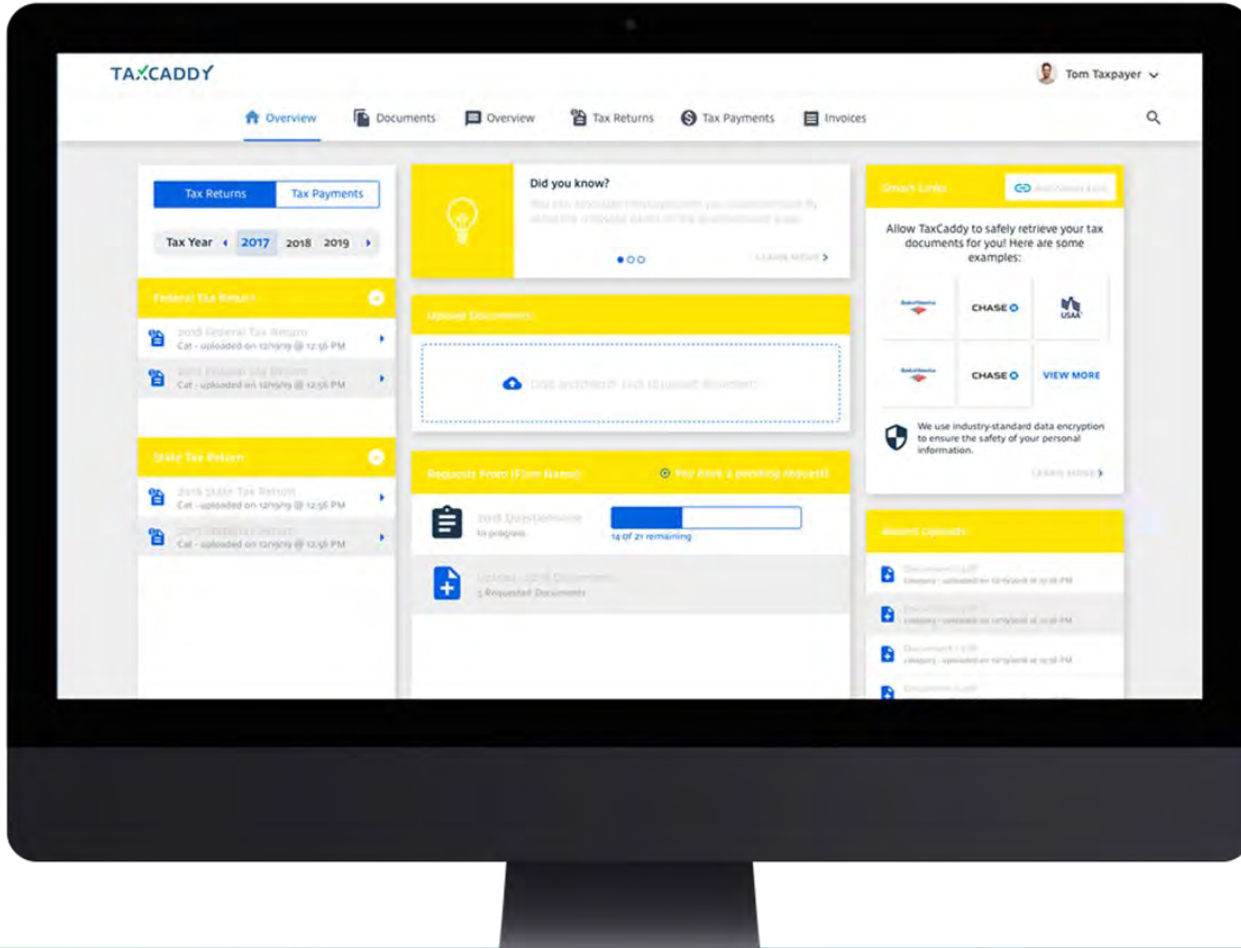


Best Practices

- **Readability:** Make sure that the colors chosen have the correct contrast and that everything is still legible.
- **Consistency:** Custom colors should be consistent with the firm brand and corporate website.
- **Preview:** Refer to the preview while setting the colors. This will help ensure that there are no conflicting colors or readability issues.
- **Set Up:** Have the right person set up your firm's custom colors. This person needs to understand the brand, preferably a designer or someone from the marketing team.

Incorrect Implementation

Example of Bad Color Set Up



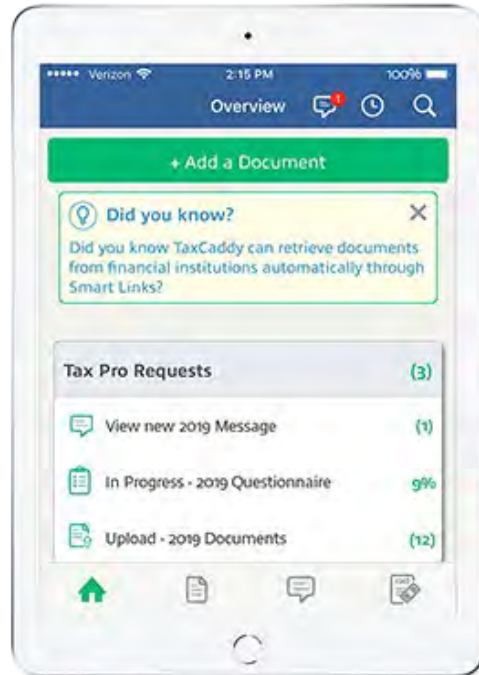
- It is important to refer to the preview. Bad color decisions can have a negative effect on both TaxCaddy and your firm via online reviews, app store reviews, and company image.
- Make sure all text has contrast and is easy to read. You will want to use your firm's lighter color as the primary, darker color as the secondary, and a darker color for body text.
- There is also a detailed help article in the TaxCaddy section of the SurePrep Help Center.



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Custom Firm Branding

- Release dates
 - Web: November 2019
 - Mobile: December 2019



Examples of Marketing



hb&k @HBKCPAs · Mar 12

Tax time is here! You only have a few weeks left to get information to hb&k for your individual returns. The easiest, fastest AND most secure way to get those tax documents to us is through [@TaxCaddy](#) #TaxCaddyTuesday #TaxTime #SignUp #SendUsYourDocuments #WeGotThis

GET YOUR INVITATION TODAY!
EMAIL TAXCADDY@HBKCPAS.NET OR CALL 251-928-2443

TAXCADDY

- EASILY MESSAGE HB&K WITH YOUR QUESTIONS
- VIEW WHICH DOCUMENTS YOU NEED TO GATHER
 - GO INTERNATIONAL
 - WILLION-INVOLVER AVE
 - TRANS-MULTI-COUNTRY
- PHOTO-SCAN YOUR DOCUMENTS
- E-SIGN DOCUMENTS ANYWHERE

hb&k



hb&k @HBKCPAs · Nov 27, 2018

Tax documents are coming in the mail soon (or maybe they've already started)! With [@TaxCaddy](#), just snap a photo to add the document to your portal & you won't have to keep up with all that paper! #TaxCaddyTuesday

Take a photo with
TAXCADDY

Use the TaxCaddy app to photograph and upload documents as soon as you receive them!



hb&k @HBKCPAs · Sep 17

Guess what's back by popular demand? #TaxCaddyTuesday!!! This week, learn how [@TaxCaddy](#) makes filing season easier by having features that match up with IRS guidelines for good record-keeping habits.

GOOD TAX PLANNING INCLUDES GOOD RECORDKEEPING

- ADD FILES AS YOU RECEIVE THEM
- KEEP DOCUMENTS IN A SAFE PLACE

GET UP TO 10% OFF AND MORE with your TAXCADDY

TAXCADDY

IRS Recommendations Vs. TaxCaddy - Hartmann, Bla...
The IRS provides recommendations for keeping up with your tax documents through the year. TaxCaddy...
[hbkcps.net](#)

1 2



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Examples of Marketing



KerberRose
643 followers
10mo • Anyone

Tax Tip Tuesday - simplify tax time with KerberRose and Tax Caddy! Complete your individual tax return is a little as 5 steps with this the Tax Caddy app.

#business #taxcaddy #tax #taxes #finance #KerberRose #accounting



Looking for an easy way to file your 2018 taxes? Check out TaxCaddy, offered by KerberRose #2018taxes #taxes #1040 #individualtaxes #technology #KerberRose #TaxCaddy



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Examples of Marketing



McDonald Jacobs @McDonaldJacobs · Nov 29, 2018

This year we're simplifying tax time for our clients with [@TaxCaddy](#)! Our clients will soon receive an email invitation with instructions on how to create their TaxCaddy account. In the meantime, if you'd like to learn more about TaxCaddy, visit taxcaddy.com

View Request List with
TAXCADDY



US NATIONAL BANK

W-2 (Wages)



MELLON INVESTOR SVC

1099s (Banks and Brokerages)

Documents requested by your tax professional are listed and categorized for your convenience!



KatzAbosch @KatzAbosch · Dec 21, 2017

This year we're simplifying tax time with [@TaxCaddy](#). Gather, deliver, communicate, e-sign - Goodbye paper organizers, hello [#TaxCaddy](#)



1



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Examples of Marketing

The screenshot shows the TaxCaddy Resource Center page on the BKD website. The page features a dark blue header with the BKD logo and the text 'TaxCaddy Resource Center' and 'TAXCADDY'. A search bar is located in the top left. A sidebar on the left lists various services and industries. The main content area has a breadcrumb trail: 'Home > Services > Tax > TaxCaddy Resource Center >'. The headline reads 'Simplify Your Tax Filing Process'. Below this, a paragraph states: 'We're teaming up with TaxCaddy to provide you with a secure, electronic solution for easily gathering tax documents and sharing them with your trusted advisor.' A list of 'Your TaxCaddy account benefits include:' follows, with three items: 'Uploading electronic documents', 'Taking secured photos of paper documents using the photo-scan feature', and 'Retrieving 1099s, 1098s and W-2s automatically'. A video player is visible on the right side of the page, showing a person sitting on a chair outdoors.

1

Click here to share your email address with your trusted advisor.

Once we have your email address, we'll send you an email invitation to join TaxCaddy. The email may take several days and will come from NoReply@taxcaddy.com. Click the "Sign Up Free" button provided in the email to create your TaxCaddy account.

2

Log in to your TaxCaddy account and accept BKD's connection request.

Accepting the connection request grants your trusted advisor permission to see your tax documents, send letters and upload your tax return for your review.

3

Start using TaxCaddy and download the mobile app.

Upload any tax documents you receive throughout the year, e.g., written acknowledgments for charitable contributions. Learn how to download the mobile app [here](#).



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Examples of Marketing

In January 2020, you'll find important action items uploaded to your account:

- ▼ [Review the client packet](#)
- ▼ [Complete the questionnaire](#)
- ▼ [Upload the appropriate documents to your document request list](#)

Once you've completed the above and finished uploading documents for this tax year, click **Done Uploading**. This will notify us to begin preparing your return.

Of course, you can always contact your trusted advisor with questions at any time.

www.BKD.com/TaxCaddy

Specialized Resources



TaxCaddy FAQ

A source for up-to-date information to help you manage your TaxCaddy account with confidence.

[Learn More](#) 



TaxCaddy User Tips

We're here to lessen the burden of tax time. Browse our list of best practices for additional TaxCaddy information.

[Learn More](#) 



Contact TaxCaddy Support

Visit TaxCaddy's Help Center for access to a broad range of resources and tutorials and available support staff.

[Learn More](#) 

Client Support

- We have a dedicated taxpayer support group in our Irvine, CA office to support your clients
- Coming soon: chat support!

TAXCADDY CUSTOMER SATISFACTION RATING

Peter Alteri, a user of TaxCaddy, would be very likely to recommend for this reason:

“ It was very convenient, less stressful, and definitely simplified the process. When I had questions, TaxCaddy Support responded quickly to my request.

Source: Peter Alteri, a user of TaxCaddy

✓ Validated | Published: Jul. 19, 2019 | TVID: 984-26D-CA9

TAXCADDY

TechValidate

Based on a response of 10 to the question "On a scale of 0-10, how likely would you be to recommend TaxCaddy?"



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Q & A



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