

Implementing Marketing Strategies in the Tax Preparation Business

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Abstract

Tax preparation businesses are crucial in helping individuals and companies understand and comply with complex tax regulations. However, tax preparation businesses need to adopt relevant and innovative marketing strategies in the digital era and with increasing competition. This research aims to explore and analyze the implementation of effective marketing strategies in the context of tax preparation business. This research uses a qualitative approach with descriptive methods. The research results show that implementing marketing strategies in the tax preparation business positively impacts increasing brand presence, attracting new customers, and achieving business growth. Using a combination of digital and offline marketing strategies, including content marketing and an active presence on social media, has proven effective in reaching a wider audience. SMART goal setting and KPI measurement help measure marketing campaigns' success, while data analysis through tools like Google Analytics provides valuable insights into customer behavior and market trends. Furthermore, calculating return on investment (ROI) allows businesses to allocate budgets efficiently, identify the most effective marketing channels, and improve the sustainability of growth.

Keywords: Marketing Strategy; Tax Preparation Business; Key Performance Indicators (KPI); Return on Investment (ROI); Google Analytics

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Introduction

Marketing is a crucial factor in expanding and achieving businesses across all sectors, including the tax preparation industry (Klepper & Nagin, 1989). Fierce rivalry in this business underscores the significance of formulating and executing efficient marketing strategies. Within the tax preparation industry, where the intricate nature of tax legislation necessitates using skilled and reliable services, marketing plays a crucial role in distinguishing oneself from competitors (Blaufus et al., 2017). Adopting an appropriate marketing plan enables the exploration of new customer bases, the maintenance of current customers, and the establishment of a robust brand image (Jasra et al., 2011). Tax preparation businesses can effectively capture the interest of potential clients by employing focused marketing strategies that emphasize the advantages of their services, offer solutions to tax-related requirements,

and deliver additional value that sets them apart in a competitive market (Porter, 2008). Marketing is essential in adapting to digital trends and information technology in the dynamic company environment (Malter & Rindfleisch, 2019). Using social media, digital marketing, and internet methods is progressively crucial in attaining a broader audience and extending the scope of a tax preparation enterprise. Hence, it is imperative to formulate comprehensive and current marketing strategies to effectively navigate fluctuating marketplaces and secure long-term growth (Ozoglu & Topal, 2020).

The significance of marketing in a tax preparation service is its capacity to establish enduring relationships with clients. By using marketing tactics prioritizing customer satisfaction, firms can establish a favorable reputation and earn consumers' trust. Consequently, this leads to customer retention and positive word-of-mouth referrals (Dong et al., 2008). Hence, marketing encompasses more than just capturing fleeting attention; it also involves establishing a robust groundwork for a tax preparation enterprise's sustained expansion and triumph (Soled & Delaney Thomas, 2017). An effective marketing strategy is essential for expanding a tax preparation service. Regrettably, numerous tax professionals prioritize enhancing their technical expertise, often disregarding the critical marketing endeavors that should form an integral component of their business plan (Karayan & Svenson, 2007). Proficiency in tax regulations and a profound technical acumen are essential in this sector. However, without proficient marketing strategies, even the most skilled tax professionals may encounter challenges in capturing the interest of prospective clients (Hotlzman, 2011).

According to Qin (2018), tax professionals who dedicate time and resources to developing a robust marketing plan might have substantial advantages in expanding their customer base. By employing effective marketing strategies, businesses can effectively convey the additional benefits they give, such as a comprehensive comprehension of the most recent tax legislation, the capacity to deliver efficient tax solutions, and prompt client support (Eichfelder & Schorn, 2012). Implementing this approach can also contribute to establishing a favorable brand reputation, significantly distinguishing oneself from rivals in a highly competitive market. Moreover, establishing an online presence is becoming progressively crucial in promoting a tax preparation enterprise (Putulowski et al., 2021). Employing social media platforms, enhancing website performance, and implementing digital marketing tactics can improve the ability of tax professionals to engage with their intended audience effectively. To establish credibility and gain the trust of potential clients, tax professionals can enhance their reputation by actively engaging in online platforms and joining tax-related online groups (Hasan et al., 2023). Tax professionals can capitalize on current development prospects by incorporating marketing methods into their business approach. Strategically designed marketing guarantees the ongoing operation of a tax preparation service and enhances its prominence and appeal in a constantly expanding market (Mattsson & Rinman, 2012). Hence, the amalgamation of exceptional technical expertise with efficient marketing endeavors will establish a robust groundwork for enduring prosperity in the tax preparation sector.

Research Design and Method

This study uses a qualitative literature review approach to gather technical knowledge. Data can be acquired through activities such as reading, researching, studying,

comprehending, analyzing, and gathering knowledge from diverse literary sources and research guidelines (Yulianah, 2022). The employed analytical approach is descriptive-qualitative, which entails comprehensively explaining the data before analyzing it to derive conclusions. This research is purely descriptive, focusing solely on observing and documenting the factors without any intention of altering or manipulating them. Alternatively, he endeavors to depict the current state of affairs. Observation, dialogue, and documentation are all methods for acquiring information. Once the data has been gathered, the analysis process involves the following steps: 1) Extracting all collected data from different sources, including primary and secondary sources; 2) Categorizing the data into problem units based on the problem statement; 3) Examining the components of the argument used to address the problem; and 4) Formulating conclusions based on the analysis of the discussed problems.

Results and Discussion

Implementation of Marketing strategies in tax preparation businesses

Marketing is crucial for achieving business success, which also applies to the tax preparation industry. An effectively designed marketing strategy serves as more than simply a means to attract a more extensive customer base; it is also a crucial factor in boosting revenue and establishing a strong brand image (Kopczuk & Pop-Eleches, 2007). By creating a well-crafted marketing strategy, a tax preparation service can effectively convey its distinctive value proposition to prospective clients, emphasize its specialized knowledge, and offer streamlined tax solutions (Galperin, 2017). This not only aids in distinguishing themselves from rivals but also guarantees that the company is the preferred option in clients' minds when they require tax preparation services. Marketing is both a means to enhance visibility and a strategic basis for sustained expansion and triumph in a progressively competitive tax preparation sector. Here are several tactics that can be employed.

Determine your target audience.

A company must determine its target audience to market a tax preparation business effectively. Know your client demographics and understand their needs and preferences. This will help develop more targeted and effective marketing strategies.

Identify your target client demographics.

When identifying the optimal clientele for a tax preparation enterprise, crucial aspects such as age, income, employment, and location significantly influence the decision. An accurate assessment of the target consumers' demographics, such as their status as students, young professionals, or retirees, can offer valuable insights into their specific requirements and preferences for tax preparation services (Palan et al., 2010). Furthermore, considering a client's income aids in assessing the level of services that may be necessary and allows for more accurate price adjustments. Engaging in client work can offer more understanding of the various sources of revenue and pertinent tax considerations to consider. Geographical location is a crucial determinant in adapting marketing techniques, considering the variations in tax legislation across different areas. To enhance their marketing efforts, tax preparation services can employ a comprehensive grasp of the demographic characteristics of potential clients. This enables them to create more tailored and pertinent marketing messages, improving their

chances of effectively reaching and captivating their intended audience.

Understand their needs and preferences.

Clients have distinct expectations when obtaining tax preparation services tailored to their unique needs and preferences. Understanding clients' needs and desires is crucial for crafting impactful marketing communications. Most clients need services that encompass a comprehensive comprehension of intricate tax legislation and efficient and tailored solutions to accommodate their financial circumstances (Stephenson et al., 2017). Ensuring the safety and dependability of handling personal financial data is crucial, while clients also seek services that offer simplicity in tax preparation without compromising on precision. Tax preparation organizations can establish solid relationships with clients by comprehending their demands and preferences, emphasizing the most significant service advantages, and formulating persuasive marketing communications that foster trust and client contentment.

Developing Client Charm

Developing client personas is a highly efficient approach for understanding the optimal client in the tax preparation industry. By considering variables such as demographics, behavior, and motivation, we can create an imaginary portrayal that closely resembles the features of the desired consumer (Venkatesh et al., 2012). For instance, a client persona may encompass details such as the individual's age, income level, occupation type, spending patterns, and the underlying drive for their search for tax preparation services. Consider "John," a young professional with a moderate income who is likely seeking tax preparation services that are prompt, effective, and knowledgeable about recent tax regulation updates. By gaining a profound comprehension of customer personas such as "John," tax preparation businesses may craft marketing messages that precisely cater to their wants and interests, establishing a closer and more pertinent relationship with the target audience. This sets a strategic basis for tailoring services, fostering trust, and enhancing client contentment.

Target audience mapping

Once you have determined the specific group of people you are targeting in your tax preparation service, the subsequent phase involves outlining the client's journey to comprehend the many points at which they interact with your firm. This step is crucial in formulating a more strategic marketing plan. Gaining insight into the client journey aids in identifying the timing and location of encounters with the business, enabling a more effective allocation of time and resources. Key elements to consider in client journey mapping encompass the stages of awareness, contemplation, and decision-making. The awareness stage includes potential clients recently acquainted with your tax preparation services through advertising, referrals, or web searches. The consideration stage encompasses a client's subsequent actions following their initial awareness of your services, like conducting additional research, perusing reviews, or engaging in a consultation. At the decision-making step, the client must utilize your tax preparation services (Van Riel & Lievens, 2004). To effectively cater to each stage of the client journey, tax preparation services can tailor their marketing messaging by comprehending these stages well. This enables organizations to effectively engage with clients by targeting them at the optimal moment and through the most

efficient communication channels. As an illustration, online advertising can be utilized for marketing efforts to raise awareness. At the same time, helpful content on a website can assist clients who are considering their options. An extensive comprehension of the customer experience enables tax preparation organizations to enhance each interaction, boost conversions, and foster robust client connections.

Branding and messaging

One of the essential elements of marketing for a tax preparation business is developing a clear brand identity and message. This includes building the business's reputation, value, and unique selling proposition.

Establish brand identity.

Establishing a cohesive brand identity in your tax preparation service commences by carefully choosing design components such as typefaces, colors, and logos that accurately convey the desired personality and values. This choice establishes a basis for consistent visual appearance across various business platforms (Hurochkhina & Riabinina, 2022). After selecting the design elements, the subsequent task involves meticulously crafting the website, social media sites, and marketing materials to represent the brand identity and maintain a cohesive narrative accurately. Organizations can attain a coherent brand experience, provide a powerful impact, and reinforce the brand's attractiveness to prospective clients through synchronizing layout, writing style, and visual aspects. Including this brand identity comprehensively is crucial, ensuring consistent utilization of design features across all platforms and communication channels. The consistent graphic elements establish a strong sense of continuity, enhancing the audience's ability to remember the brand and fostering a coherent connection with them. By adopting this strategy, tax preparation companies may capitalize on the advantages of enhanced brand recognition, distinguish themselves in the market, and foster customer loyalty by establishing a cohesive and favorable brand image.

Create a unique Sales Proposition

A Unique Selling Proposition (USP) is the main key to differentiating a tax preparation business from competitors in the area. To highlight advantages, businesses must develop compelling messages that highlight their key strengths. For example, a focus on fast turnaround times can attract the attention of clients who are looking for service that is efficient and responsive to their needs (Garfinkel, 1977). Marketing affordable prices can be an attraction for market segments that pay attention to economic value. Meanwhile, emphasizing experience and expertise in tax preparation can provide additional confidence to clients. Personalized service, which understands each client's unique needs, can be a significant differentiator that increases customer satisfaction. It is important to design marketing messages that clearly reflect the USP of the tax preparation business. This message should not only highlight the superiority of the service, but also create an emotional appeal and provide added value that is perceived by the client. By understanding that client needs and preferences vary, businesses can tailor marketing messages to target the most relevant market segments. Thus, creating a strong USP and designing the right marketing message can be a key step in dominating the tax preparation market in the region.

Create consistent messaging across marketing channels.

The effectiveness of marketing a tax preparation firm relies heavily on maintaining a consistent message throughout several marketing channels. Consistency in this context refers to using compatible design components and aligning messages across all platforms. By utilizing brand identity and unique selling proposition (USP) as a framework, organizations may develop persuasive and consistent communication across many platforms, such as websites, social media pages, print ads, and other marketing materials (Palmatier et al., 2019). Creating great visual cohesiveness involves integrating comparable design components, such as logos, colors, and typefaces. Furthermore, the delivered message should align with the Unique Selling Proposition (USP), accentuate the business's strengths, and present compelling justifications for clients to select it. Consistency in messaging establishes a strong and dependable perception among prospective clients, fostering confidence. A tax preparation enterprise can bolster its brand credibility by consistently conveying a coherent message and ensuring it fulfills its brand commitments at every customer interaction to enhance the likelihood of turning prospective clients into actual clients.

Use testimonials and Reviews.

One effective strategy to improve the brand identity of a tax preparation business is to utilize testimonials and reviews from satisfied clients. Inviting clients to leave reviews on a website, social media page, or other platform can paint a positive picture with potential clients. Including these testimonials in marketing materials, such as brochures, websites, or advertising campaigns, can directly highlight a client's positive experience and prove the reliability and expertise of the tax preparation service (Andreassen, 1994). Reviews from real clients can provide an honest and trustworthy point of view, helping to build trust and interest in potential clients. It is essential to ensure that the review reflects various service aspects, including service speed, expertise in understanding tax rules, and overall customer satisfaction. Using direct quotes from satisfied clients can also provide a human and personal dimension to a business, making the brand more identifiable and memorable for clients. By including client testimonials and reviews in its marketing strategy, a tax preparation business can strengthen its brand image as a trusted and reputable service provider in the industry. This strengthens brand identity and can drive business growth by building a positive reputation and attracting new customers.

Digital Marketing Strategy

Implementing digital marketing methods can enhance your online presence and broaden your audience reach. Businesses must formulate a proficient digital marketing strategy to allure and keep customers.

Develop websites that convert visitors into clients.

Nowadays, digital marketing methods have become essential for tax preparation organizations to enhance their online presence and broaden their audience reach. Businesses must have a well-crafted digital marketing strategy to leverage the diverse digital platforms at their disposal fully. This entails enhancing a website's performance for search engines (SEO), utilizing social media, implementing focused digital advertising campaigns, and employing a

captivating content strategy. Therefore, businesses can connect with potential clients across many internet platforms and establish a robust brand presence. Through the meticulous crafting of pertinent marketing messages and the precise targeting of specific demographics, digital marketing methods effectively enhance brand recognition and foster continuous consumer interaction. Hence, formulating a proficient digital marketing strategy is imperative for the tax preparation industry, as it is pivotal in acquiring, retaining, and expanding the customer base (Davison et al., 2018).

Optimizing your website for search engines

SEO (Search Engine Optimization) is a crucial strategy for enhancing the online visibility of a tax preparation service. This procedure entails enhancing website content using specific keywords and phrases commonly employed by the intended audience. Strategically integrating relevant keywords into a website's content is crucial for improving ranks on search engine results pages (SERPs). Through optimizing content, meta descriptions, and website structure, businesses can enhance their exposure in search engines and effectively attract a larger volume of relevant traffic. Gaining a comprehensive understanding of the search patterns of the target audience and evaluating the efficacy of the keywords employed is crucial. This enhances the ranking in search engine results pages (SERPs) but also aids in establishing online credibility and attracting prospective clients. Hence, the meticulous incorporation of SEO tactics can enable tax preparation enterprises to distinguish themselves in the digital realm, connect with future audiences, and enhance their online visibility (Azzopardi et al., 2018).

Develop and implement content marketing strategies.

Information marketing has emerged as a crucial tactic for expanding a tax preparation service, encompassing creating and disseminating valuable, pertinent, and consistent information. This method not only focuses on generating informative content but also aids in attracting and retaining clients by offering helpful information. Businesses can enhance their brand awareness and establish industry authority by providing comprehensive counsel and insight on tax preparation (Blaufus et al., 2017). Content marketing functions as both a means to capture the intended audience's interest and a successful method to engage with them continuously. By providing pertinent and valuable content, businesses can establish trust and credibility with clients, positioning themselves as a dependable and authoritative source of information. Content marketing fosters client acquisition and fortifies corporate connections with audiences, establishing a robust groundwork for sustained prosperity.

Social media marketing

Employing social media platforms like Facebook, Twitter, and LinkedIn is a smart move to broaden the reach and engagement of tax preparation services with consumers. By developing a well-crafted social media marketing strategy, businesses may proactively interact with their intended consumers, cultivate stronger connections, and advertise their tax preparation services. The platform serves as both a medium for sharing valuable and pertinent content and an optimal space for addressing client inquiries and delivering real-time assistance (Jiang et al., 2023). Moreover, maintaining an active presence on social media

platforms also enhances search engine rankings, as the presence of links and social interactions can augment online authority. By leveraging social media as a versatile marketing tool, tax preparation services can simultaneously accomplish two objectives: establishing a robust online community and enhancing their presence in the digital realm.

Offline Marketing Strategy

Despite being conventional, offline marketing tactics significantly affect an on x preparation service. Implementing this method can broaden your audience, enhance brand recognition, and allure prospective customers who may have yet to come across your firm via digital marketing endeavors. Below are a few impactful offline marketing tactics. Traditional marketing methods are significant and can serve as a crucial foundation in promoting a tax preparation service. Attending local or industry events allows individuals to establish connections with potential clients and cultivate robust partnerships. Engaging in or financially supporting local events or tax seminars enhances business visibility and shows expertise among future clients. In addition, print advertising in local or industry-specific media, such as community newspapers or trade publications, can successfully target individuals who may not frequently access the internet. Print advertisements featuring visually appealing designs and coherent messages contribute to the establishment of brand recognition within the local community. Direct mail and email marketing campaigns can reach specific target populations and deliver immediate information to potential clients. By employing marketing materials that accurately convey the brand identity and established marketing messages, firms can effectively capture the attention and inspire action from recipients of the communications. Acknowledging that these offline marketing techniques should enhance internet marketing endeavors and adhere to existing brand messages is crucial. Tax preparation organizations can develop a comprehensive and efficient marketing plan by ensuring the coherence of their online and offline presences. Therefore, tax preparation enterprises can achieve long-lasting expansion and effectively penetrate a broader customer base by implementing efficient marketing strategies and establishing a compelling brand.

Measuring And Evaluating marketing efforts

To ensure that your tax preparation business maximizes its marketing potential, it is important to set benchmarks and measure the effectiveness of your efforts.

Setting marketing goals and KPIs

Establishing explicit objectives and key performance indicators (KPIs) is essential for evaluating the effectiveness of a tax preparation firm's marketing endeavors. Prioritize the aspects most pertinent to your marketing objectives, including the intended influx of new clients, targeted website traffic, and anticipated social media interaction. Concrete goals encompass quantifiable targets, such as augmenting the number of new customers by a specific percentage or enhancing website traffic by a particular portion within a designated timeframe. The precision of this aim facilitates the evaluation and quantification of success or failure. Additionally, targets and Key Performance Indicators (KPIs) must be attainable, considering the firm's available resources and skills. Setting realistic goals helps to prevent creating unnecessary expectations and ensures that each accomplishment has a beneficial

effect on the overall corporate objectives. The significance of the target for general corporate purposes is crucial. For instance, if the organization aims to enhance its market share, the marketing objectives should concentrate on augmenting the quantity of new customers or expanding into unexplored territories. Additionally, the temporal dimension must also be considered. Implementing time constraints or deadlines (time-bound) offers clear guidance and a sense of urgency to marketing endeavors. Employing a SMART (specific, measurable, attainable, relevant, and time-bound) methodology guarantees that objectives and key performance indicators (KPIs) are distinctly outlined and can be efficiently controlled. By adopting this methodology, tax preparation enterprises can accurately assess the effectiveness of their marketing endeavors, modify their strategies, and actively attain their corporate objectives.

Track analytics and performance metrics

Monitoring analytics and performance indicators is crucial for evaluating the efficacy of a tax preparation business' marketing endeavors. Google Analytics, a renowned website analytics tool, offers comprehensive insights into site performance, encompassing traffic, traffic sources, and user activity. This data enables firms to quantify the effectiveness of Internet marketing initiatives, comprehend visitor behavior, and ascertain the most sought-after pages. By examining these measures, organizations can pinpoint possible areas for enhancement, such as optimizing site navigation or modifying content to enhance visitor engagement. Social networking sites offer crucial integrated analytics solutions in addition to Google Analytics. By conducting this study, firms may effectively track user engagement, campaign reach, and audience demographic data. Through the comprehension of engagement and response patterns on social media, organizations may enhance content strategies and customize marketing messages to better align with the preferences of their target audiences. This data also aids in identifying the most efficient marketing channels for accomplishing business objectives. Utilizing marketing data judiciously is crucial for discerning upcoming trends and monitoring customer behavior. Data analysis enables firms to make informed judgments, adapt marketing strategies as needed, and reinforce areas that have yielded favorable outcomes. With a strategic approach to analytics and performance metrics, tax preparation organizations may employ data successfully to boost marketing efficiency and achieve long-term success.

Measuring ROI

Assessing the efficacy of a tax preparation firm's marketing endeavors necessitates the meticulous computation and quantification of return on investment (ROI). Before anything else, organizations must meticulously ascertain the expenses linked to each marketing platform or channel employed. This encompasses expenditures such as advertising charges, content development costs, and any other associated fees. Subsequently, computing the revenue streams associated with each of these media outlets offers a distinct perspective on the efficiency of each channel in producing outcomes. The subsequent action involves scrutinizing customer acquisition costs (CAC) across all media. CAC evaluation enables firms to ascertain the precise expenses incurred in acquiring a single consumer through several channels. By comparing Customer Acquisition Costs (CAC) across different platforms,

businesses can discern the most effective marketing channels and allocate their marketing budgets more strategically. Evaluating the performance of a marketing campaign is crucial, and one significant component of this evaluation is measuring the return on investment (ROI) using established criteria and goals. By consistently measuring return on investment (ROI), organizations can detect trends and patterns that inform improvements to marketing tactics. Businesses can achieve a detailed measurement and evaluation of marketing effectiveness by employing SMART goals, such as setting a specific target for increasing return on investment (ROI) by a given percentage within a defined period. It is crucial to acknowledge that assessing return on investment (ROI) is not a singular occurrence but rather a continuous and ongoing procedure. Regularly analyzing marketing data yields valuable insights for ongoing enhancement. By utilizing the insights from ROI research, tax preparation companies can implement essential strategic modifications, streamline marketing endeavors, and optimize expenses associated with acquiring customers to attain ongoing expansion and durability.

Conclusions

Marketing is crucial in the tax preparation industry as it plays a pivotal part in establishing a prominent brand image, drawing in clients, and ensuring long-term expansion. A comprehensive marketing plan entails integrating both online and offline marketing techniques, including channels such as social media and local events, to expand the target audience's reach. Content marketing has emerged as an essential instrument for effectively communicating valuable information regarding tax preparation, establishing credibility, and enticing new clientele. Setting SMART goals and selecting suitable key performance indicators (KPIs) is crucial for evaluating the effectiveness of marketing endeavors. By adhering to these standards, firms can more efficiently monitor campaign outcomes and make decisions based on data analysis. They utilize data analysis tools like Google Analytics and social media analytics platforms to facilitate comprehension of customer behavior, identify patterns, and provide essential insights to enhance decision-making. Subsequently, it is necessary to quantify marketing endeavors' return on investment (ROI). By calculating the costs associated with acquiring customers and finding the most efficient marketing channels, allocating the money more efficiently becomes possible. Assessing return on investment (ROI) using appropriate metrics enables firms to gauge the effectiveness of their efforts and pinpoint areas that need enhancement. Through the continuous analysis and enhancement of marketing techniques, tax preparation organizations can attain enduring expansion, foster robust client relationships, and fortify their brand visibility in the market.

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