

Like most professionals you joined LinkedIn, most probably setup a basic profile, maybe even uploaded a picture – **SO NOW WHAT!**

With a little bit of knowledge and a plan, you can do a lot to leverage LinkedIn to grow your practice.

While the methods discussed in this ebook are GREAT for many business segments, the material is designed primarily for firms that offer **tax problem resolution services**.



Agenda

- LinkedIn overview
- All-star profile
- Build your network
 - Advanced LinkedIn Search
 - Connection best practices
 - Follow-up actions to grow and reinforce relationships
- Special offer and access to the presentation PDF



We will start with an overview of LinkedIn today, then get into building a powerful profile to attract the right targeted connections, how to initiate and grow the relationships, and of course we will end with a special offer.

While what you will read today may sound overwhelming – I believe it will be worthwhile to stick it out to the end.



The graphic features a blue background on the left with a white-bordered photo of Bob Torella. To the right of the photo, the text 'About Me' is written in white, followed by 'BAT Consulting Group Inc', 'www.batcgi.com', 'bob@batcgi.com', and '631-760-5440 (Call or text)'. The right side of the graphic has a light gray background with the title 'Bob Torella MBA' in bold black text, followed by a bulleted list of his professional background and a LinkedIn logo. At the bottom left of the graphic is the text 'BAT Consulting Group - www.batcgi.com' and at the bottom right is a small blue number '3'.

About Me
BAT Consulting Group Inc
www.batcgi.com
bob@batcgi.com
631-760-5440 (Call or text)

Bob Torella MBA

- Working with CPA and attorneys for over 25 years (Yikes!)
- For the past 5, concentrating on leveraging websites and social media for business development
- Certified webmaster, Certified social media marketer
- I have found one social media platform the best networking with highly-qualified highly-targeted professionals, namely LinkedIn
- If you haven't done so – I invite you to connect with me on LinkedIn to stay on top of industry trends

BAT Consulting Group - www.batcgi.com

3

Hi, I am Bob Torella MBA out of Long Island NY.

I have been working with CPA, EAS, tax pros and attorneys for over 25 years. Really, Yikes

I am a certified webmaster and certified social media marketer and I have most of the social media platforms to try and grow my business and my client's business. **One platform, LinkedIn, stand clouds above the rest and I will explain why today.**

If you are NOT connected with me, I invite you to find me on LinkedIn and connect to stay on top of LinkedIn trends.

About LinkedIn

- Largest social platform to connect top-level business professionals
- Connect directly with principals of your targeted market
- Someone new joins LinkedIn every 2 seconds
- In the USA, 146M members – 100M active monthly
- Microsoft paid \$26.2 billion for LinkedIn in 2016



BAT Consulting Group - www.batcgi.com

5

As I mentioned, most business professionals are LinkedIn members, but few do anything worthwhile with it.

LinkedIn is THE largest social platform designed for business professionals.

Someone new joins LinkedIn every 2 seconds.

If you are not aware, Microsoft purchased LinkedIn for a tidy 26 billion back in 2016 and I expect a lot from this collaboration in the future.

Why LinkedIn



Attention Tax Res Pros

What if you were invited to a network event **each month** with 100 or 200 highly targeted potential referral partners that may include attorneys – CPAs, EAs, Attorneys, Loan officers, Realtors, and more.

LinkedIn is the vehicle that can make it happen.

What is missing is a effective and cost-effective system to leverage this opportunity (until now).

While the processes and systems discussed in this ebook apply across many different business segments, my consultancy and this book is best for firms that offer tax resolution services to their clients and/or want to grow that profitable aspect of their business further.

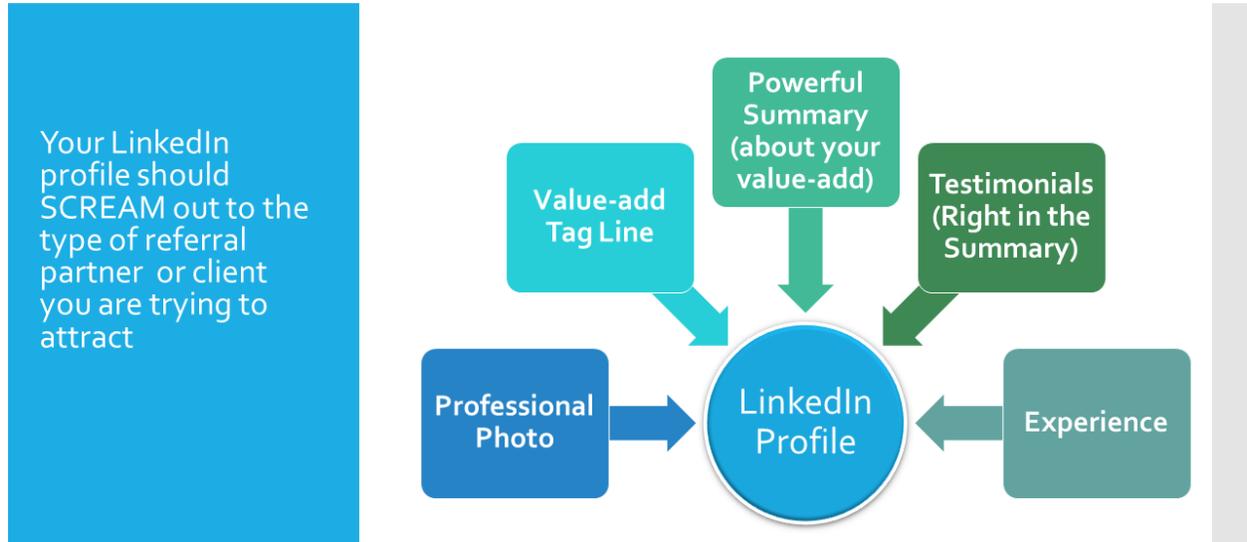
I am confident that we have all attended networking events. What if you were invited to a network event **each month** with **100 or 200 highly targeted potential referral partners** that may include **CPAs, EAs, Attorneys, Loan officers, Realtors**, and more. That's 100 or more people that you know and are just as interested in networking with you. LinkedIn is the only social platform that can make it happen.

To be honest, just connecting to someone on LinkedIn doesn't make him/her a referral partner. Rarely is someone going to hand over a client without really knowing you and trusting you. But it opens the door to the possibility of building a referral relationship and for those that do become referral partners – it is the gift that keep on giving.

Unfortunately, most LinkedIn members have no clue about how to make this happen and leverage this amazing opportunity.

But you will get these secrets today and it is easier than you think.

The Foundation: Build an All-star LinkedIn Profile



BAT Consulting Group - www.batcgi.com

7

It all starts out with a **powerful profile**. I find most business professionals use their LinkedIn profile as a business card, just the basic facts. It rarely, and I mean rarely, is complete enough to attract the best partners or clients to their practice. And definitely too self-centered.

To start with you need a **Professional Photo** (not a Facebook party cutout). And many profiles have NO photo. Really Sad.

Your **tag line** is also important, and I will drill down shortly.

Your **Summary** is best served to talk about your value add, not your professional history (that can be found elsewhere in LinkedIn).

Testimonials or case studies (right in the Summary) are a great way to have others tout your capabilities.

Now the **Experience** section should be all about your firm.

Let's drill down into a few of these areas

The Foundation: Build an All-star LinkedIn Profile

Value Add Tag Lines

NOT President of ABC Firm



BAT Consulting Group - www.batcgi.com

- Helping people in deep tax trouble with the IRS get their life or business back on track
- We resolve big and small tax issues and you never have to speak to the IRS.
- Helping people with big tax problems restore normalcy in their life.
- NEVER call the IRS without speaking to a tax resolution specialist first
- If IRS has you on FIRE, We can put out the flames.

8

Your professional photo and tag line are attached to everything you do on LinkedIn.

Your tag line should not be about you (President of ABC firm), but about of your value add. Here are a few examples.

- Helping people in deep tax trouble with the IRS get their life or business back on track
- We resolve big and small tax issues and you never have to speak to the IRS.
- Helping people with big tax problems restore normalcy in their life.
- NEVER call the IRS without speaking to a tax resolution specialist first
- If IRS has you on FIRE, we can put out the flames.

See the deference? Make sense?

The Foundation: Build an All-star LinkedIn Profile

Powerful Summary

NOT about you but your value-add

- What you do
 - Focus on growth area
- Who You work with
 - Partner or best prospect
- Success stories
- How it works
 - Free tax analysis
- How to contact you (even before they connect)

IRS Doctor
www.myirsdoctor.com
(214) 447-7344
Get relief from tax problems today with IRS Doctor

David C. Bradley CPA • 1st
Tax Debt Relief for Individuals and Businesses. End the Agency and Get Your Life Back!
Dallas, Texas

Bradley & Associates, P.C.
Texas A&M University-Corpus Christi
See contact info
See connections (500+)

WHAT WE DO: The IRS Doctor was established to provide Tax and IRS Tax Resolution Strategies to individuals and businesses nationwide. Most of our clients owe \$10,000 or more to the IRS.

WHO I WORK WITH: Many of our clients are referred to us from other professionals who are acting in the best interests of their clients. This may include: Attorneys • Tax Pros (CPAs, EAs, Accountants) who do not deal with IRS collection issues or are not comfortable with sometimes large and complex cases • Realtors • Mortgage Lenders • Loan Officers • Credit Counselors.

SUCCESS STORIES:

- ✔ Single dad with 2 kids owed IRS over \$250,000 and the IRS was garnishing 90% his wages! We were able to get the garnishment lifted within one week and we negotiated a non-collectible status on his behalf (meaning no payments were required going forward)
- ✔ A young couple had several years of non-filed returns with a wage garnishment pending with the employer. We prepared the back tax returns and got the wage garnishment released plus an affordable payment plan in place all within 5 business days.
- ✔ A well-respected talk show host owed the IRS over \$2.5M and was the subject of a wage garnishment for over 6 months. We were able to negotiate the full release of the wage garnishment and negotiate a \$1k per month payment on the debt within 30 days.

HOW IT WORKS: We start with a free evaluation to understand your specific tax situation. If we agree to take your case, we will handle all aspects until successful resolution. You will never have to speak to the IRS.

Disclaimer: Each case is resolved based upon the facts sufficient to apprise the IRS of the exact basis for possible tax relief.

READY TO TALK? Reach out to me directly here on LinkedIn, email me at ddb@pafirmdallas.com, visit us online at <https://myirsdoctor.com> or call me directly at 214-710-1255.

We love getting and giving referrals. Consider joining my referral network below.

BAT Consulting Group - www.batcgi.com

Next add a SUMMARY which is optional by default – the Summary is NOT about your professional experience but about your value-add. Explain what makes your firm different (especially from the big box stores as seen on TV).

Your **Value-add Summary** should include:

- **What you do** – Pick one or 2 growth areas
- Discuss **who you work with** - who is your best Partner for referrals or best client prospect
- Add **Success stories or testimonials** – this may be case studies or client recommendations (We will see a few examples shortly)
- **How it works** – In tax trouble, start with a free tax analysis
- **Tell them how to contact you (even before they connect with you)**

A good profile will also help with organic Google searches too.

Here is a good example from one of my clients.

The screenshot shows a LinkedIn profile for David C. Bradley, CPA. Annotations include: 'Custom header' pointing to the top banner image; 'Pro photo' pointing to the profile picture; 'Great tag line' pointing to the headline 'Tax Debt Relief for Individuals and Businesses. End the Agony and Get your Life Back!'; and 'Great tag line' pointing to the summary text 'WHAT WE DO: The IRS Doctor was established to provide Tax and IRS Tax Resolution Strategies to individuals and businesses nationwide. Most of our clients owe \$10,000 or more to the IRS.'

David has a Professional photo and a custom background image. Great to boost his brand.

Great tag line

Detailed Summary including success stories

Contact info with a call to action

You are limited to 2000 characters and links will **NOT** work in the summary, but you can attach them right after the summary.

What We Do

WHAT WE DO: The IRS Doctor was established to provide Tax and IRS Tax Resolution Strategies to individuals and businesses nationwide. Most of our clients owe \$10,000 or more to the IRS.

Work With

WHO I WORK WITH: Many of our clients are referred to us from other professionals who are acting in the best interests of their clients. This may include: • Attorneys • Tax Pros (CPAs, EAs, Accountants) who do not deal with IRS collection issues or are not comfortable with sometimes large and complex cases • Realtors • Mortgage Lenders • Loan Officers • Credit Counselors.

Success Stories

SUCCESS STORIES:

- ✓ Single dad with 2 kids owed IRS over \$250,000 and the IRS was garnishing 90% his wages! We were able to get the garnishment lifted within one week and we negotiated a non-collectible status on his behalf (meaning no payments were required going forward)
- ✓ A young couple had several years of non-filed returns with a wage garnishment pending with the employer. We prepared the back tax returns and got the wage garnishment released plus an affordable payment plan in place all within 5 business days.
- ✓ A well-respected talk show host owed the IRS over \$2.5M and was the subject of a wage garnishment for over 6 months. We were able to negotiate the full release of the wage garnishment and negotiate a \$1k per month payment on the debt within 30 days.

Next Steps

HOW IT WORKS: We start with a free evaluation to understand your specific tax situation. If we agree to take your case, we will handle all aspects until successful resolution. You will never have to speak to the IRS.

Disclaimer: Each case is resolved based upon the facts sufficient to apprise the IRS of the exact basis for possible tax relief.

Contact Info

READY TO TALK? Reach out to me directly here on LinkedIn, email me at dcb@cpafirmdallas.com, visit us online at <https://myirsdoctor.com> or call me directly at 214-710-1255.

We love getting and giving referrals. Consider joining my referral network below.

The Foundation: Build an All-star LinkedIn Profile

Experience

This is about your firm
Add valuable keywords

experience



Founder and Principal - Attorney

The W Tax Group

Dec 2016 – Present · 2 yrs 3 mos

400 Galleria Offcentre, Suite 210, Southfield, MI 48034

The W Tax Group is a full-service, attorney based, tax resolution firm specializing in resolving and reducing IRS and state tax debt with strategic innovation and an in depth understanding of the Internal Revenue Manual. Our attorneys resolve a wide range of tax issues including wage garnishments, bank levies, liens, and penalties. The W Tax Group prides itself on negotiating the most favorable tax debt settlements allowed under law.

What kind of tax resolution matters does The W Tax Group handle?

- IRS Audit Representation
- Non-Filed Tax Returns
- Back Taxes Owed
- Payroll Tax Problems
- IRS Levies and Liens
- IRS Wage Garnishment
- IRS Seizures
- IRS Payment Plans
- Offer-In-Compromise
- Bankruptcy
- Innocent Spouse Relief, and more.

If you are in BIG tax trouble with the IRS (owe more than \$8000) – don't delay and make matters worse – call us today at 877-500-4930. [See less](#)

BAT Consulting Group - www.batcgi.com

10

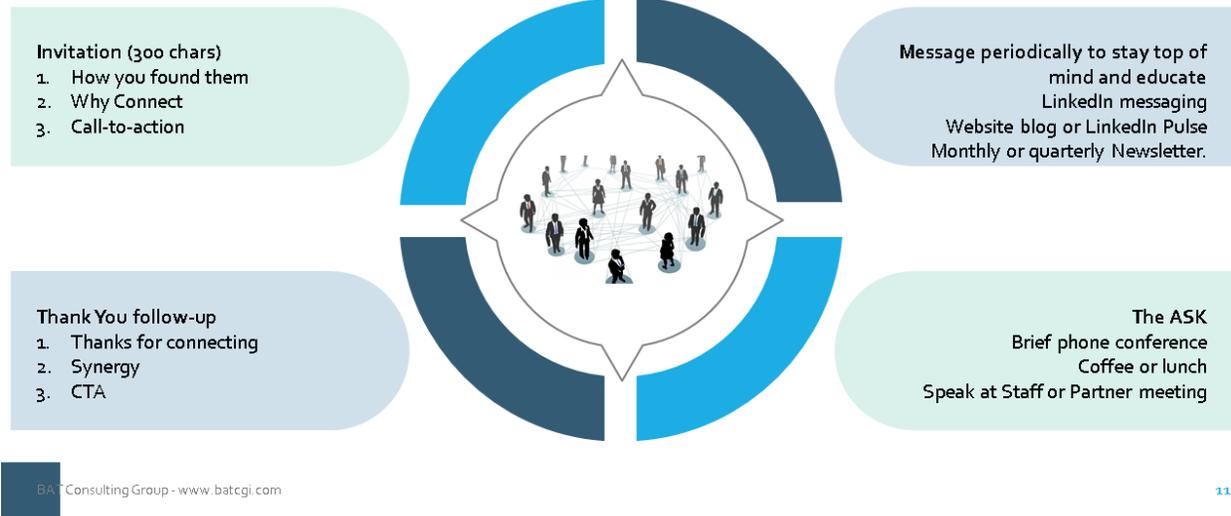
The Experience section of your profile is about you, your firm and the services you offer.

Also add keywords (like tax lien and offer-in-compromise and IRS). Sure, add a call to action.

Much of this info can be gathered from your website > About US page (feel free to copy/paste)

How to Connect and Grow Relationships

Start a new relationship - casual



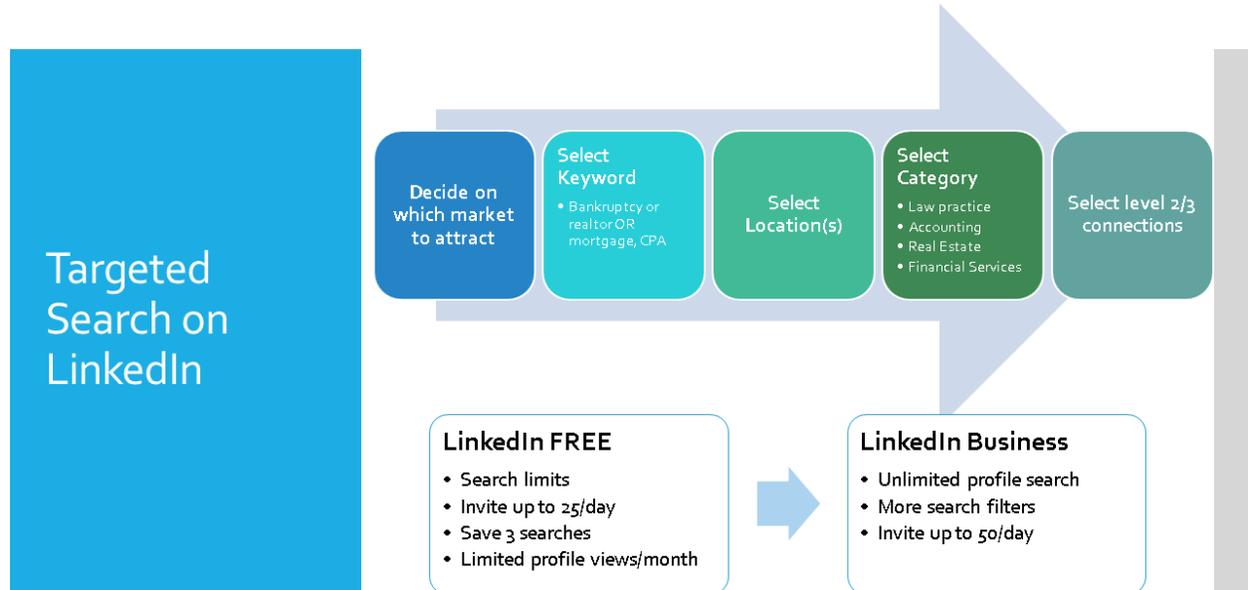
Let's discuss how to connect and grow relationships on LinkedIn – tip, start casual. You would not walk into a bar and say “Hi I am Bob will you marry me” – while it may work in some rare cases you probably have little chance for long-term success!!

You want to start with a **targeted custom invitation**. Explain how you found them, why you want to connect, and a call to action. Most likely, lets connect. We will drill down shortly.

Then you want to **send a Thank You message** to all the connect with you. Very few LinkedIn members do this, and this is so important to build the relationship. Again, I will drill down shortly.

You want to **periodically keep in touch to stay top of mind, educate, and grow the relationship**. You can do this with LinkedIn messaging (a great option from your smartphone), or send them a link to a new blog or send them your newsletter.

Of course, attached to all these messages should be **the ASK**, a call-to-action to move the relationship along. This could be asking for a brief phone call, meet for coffee or lunch, or ask to speak at a partner or staff meeting about tax res tips. Let's drill down.



BAT Consulting Group - www.batcgi.com

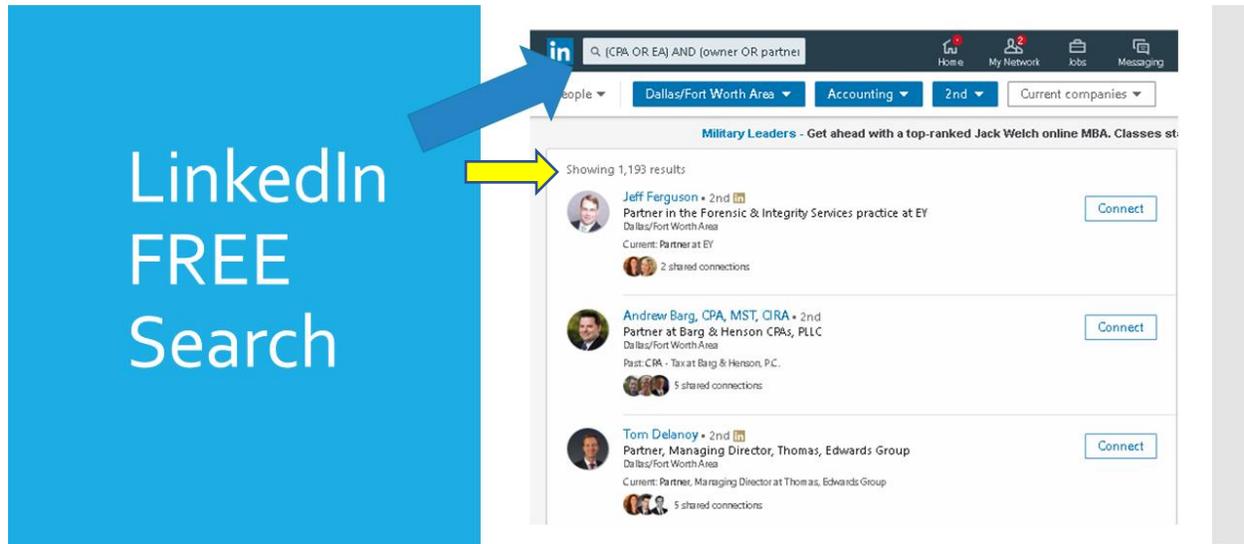
12

The first step is to decide who you want to connect with – this is done with a LinkedIn search (right on the top toolbar of LinkedIn).

In the search box, **Select a keyword** like bankruptcy or CPA or realtor, **select an area**, optionally you **can select a category** (law practice, or accounting, or real estate). And lastly **select level 2 and 3 connections**. These are people connected to your connections and people connected to their connections – this expands your reach quickly.

You will most likely get pages of search results. Keep in mind LinkedIn Free plan has search limits and it is not recommended to invite more than 25 connections a day or you may wind up in LinkedIn jail. Not a bad place, I have been there in the past – easy to get out of – and I learned a lot then developed a new system!

LinkedIn business gives you an unlimited profile search per month, and you can safely connect to 50 targeted people a day. That subscription costs \$60 month and you can get a free month if you never used it. For most, the FREE plan is sufficient.



BAT Consulting Group - www.batcgi.com

13

Here is a look at a real search on the LinkedIn FREE plan

I searched for CPA or EAs that are owners or partners in the greater Dallas area in the industry of accounting. This is a Boolean search – note the **OR** and **AND** are capitals. A plethora of opportunity most probably exists in your area too.

Sales Navigator subscribers can select specific categories to include, owner, partner, CEO, CXO, director, and the like as well as limiting the size of the company.

Consider other search criteria like these examples.

- Realtor **OR** Broker **AND** (Owner or Partner)
 - Select area and Category-Real Estate
- Loan Officer **AND** (Owner or Partner)
 - Select area and Banking and Financial Services
- Bankruptcy
 - Select area and Category- Law Practice
- CPA **AND** yourcityname

Sample Invite for CPA

How You Found Them

Why Connect

The Ask

Hi FIRSTNAME,
LinkedIn suggested we may be a good fit to connect.
My tax practice concentrates in assisting taxpayers with IRS issues – it's all we do. If you avoid IRS tax engagements or don't handle large or complex tax debt cases – we should talk.
Let's connect. YOURNAME

273 chars

300 chars – no phone or links allowed

BAT Consulting Group - www.batcgi.com

14

So now let's move on to the custom invite message.

When you select the member to connect, LinkedIn will prompt you to add a message – **NEVER** use the default message – it is just too impersonal. You are limited to 300 chars and no links or phone numbers allowed. Make the initial message personal.

Include How you found them, Why connect, and a CTA

Here is a sample invite to a CPA. I've noticed tax pros either LOVE or AVOID tax res engagements.

This one is 273 chars depending on the members name and your name.

Sample Thank You for CPA or EA

Why Connect

Reminder

CTA

Educational Freebie

Hi FIRSTNAME,

Thanks so much for connecting. As I mentioned, my firm concentrates on tax problem resolution services for taxpayers with large or complex tax problems, typically over \$8K.

Many CPAs, EAs, and tax pros I know refer their clients to us because they dread IRS tax resolution work. Either they have no time for this type of engagement, or they simply are not interested in doing it. However, they still want to find a solution for their clients.

If this is you, we should definitely talk.

-> If you are open to a brief introductory call or even a meeting over coffee, please call me, reply to this email, or visit SCHEDULE LINK and pick a time that is most convenient for you.

I look forward to building a meaningful and prosperous relationship.

CONTACT INFO

PS – click here to download my free tax resolution guide including what to do if you get a letter from the IRS

Just like an email, links and phone# OK

BAT Consulting Group - www.batcgi.com

15

A **thank you message** is unique and is highly recommended to move the relationship forward.

Include a reminder of **what you do** and **how you can help them** (help them help their clients in trouble, save them time, build client loyalty). The **CTA (call-to-action)** is to try and move the relationship forward with a brief call or meeting. email, call or schedule an appointment to determine if synergy exists to refer clients.

It is also a good time to add an **educational freebie** or access to your blog or newsletter.

Again, you are building a relationship first, then ask for a referral down the road.

In theory, you connected to a targeted referral partner you most probably did NOT know and sent them a TY message to move the relationship along.

Other follow-up best practices

- **Message a new connection DAILY**
 - Review their profile and send a soft message.
 - Hi NAME, how do you handle tax controversy engagements?
 - Quick question: Do you like or avoid tax resolution work?
 - Didn't hear back, what is a good client referral for you?
 - We both know NAME, surprised we haven't met
 - Went both to the same school, want to network with an alumni?
 - Any other one-liner you create to start a conversation
- **Send them a newsletter periodically** (tell them first)
- **Send them a link to your blog or article written**
 - I thought this blog may interest you (first paragraph, link)

NOTE- if the member has a green dot in their profile pick they are somewhat likely to be online at that moment

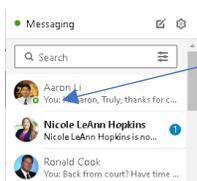
BAT Consulting Group - www.batcgi.com

16

It is also a good practice to **follow up with a quick message** in a few days.

Pick ONE person a day – that should take 5 mins or less. I typically use my LinkedIn phone app for this. Ask them something like:

- Hi NAME, how do you handle tax controversy engagements?
- Quick question: Do you like or dread tax resolution work?
- Didn't hear back, what is a good client referral for you?
- We both know NAME, surprised we haven't met
- We both went to the same school, want to network with an alumni?
- Any other one-liner you create to start a conversation



In the message area of LinkedIn, you may notice a **green dot** in their profile pick meaning they are somewhat likely to be online at that moment. This is a good choice to message since you may get a quick reply.

You can also send them a message if you have a new blog or newsletter. **Links are OK in the message.** This is a great way to educate and stay top of mind.

Hopefully you are getting a feel of the power of LinkedIn to build a highly targeted professional network.

I am confident most of you have NOT been doing anything like this.

Sounds good
but how long
will this take?

- Send custom **10 invites a day** = 40 minutes
- Custom TY messages to all new connections = 15 minutes
- Message ONE member a day = 5 minute

One hour per day

X billable rate

X 20 business days/month

20 hours X YOUR BILLABLE RATE = \$\$\$\$\$

Bottom line, don't have the time nor the continued energy to take on a task of this nature and it is just too expensive to do it alone.

Hard to delegate due to the relationship building

I learned the hard way and then I developed a new system.

BAT Consulting Group - www.batcgi.com

17

Now you might be saying, Bob this all sounds good, but it looks like a lot of work and I have little time? Understood and it get better fast.

- Let's say you want to reach out to **10 new potential referral partners a day** with custom invite messages – that's about 40 minutes if you are good.
- And you want to send custom Thank You message like we discussed – add another 10-15 minutes.
- Then reach out to one new connection a day with a short personal message – that adds another 5 minutes.

In general, to use this system you would need 1 hour a day

That totals about 20 hours a month, then multiply by your billable rate and it is huge. At just \$200/hr that's about **\$4000** in opportunity cost and **25 connections a day would run nearly 10K.**

Way too expensive to implement. And really hard to delegate due to the relationship building.

(don't pass out yet).

I learned the hard way and then I developed a new system.



You can STOP reading here if you want to try this system yourself to build a referral network on LinkedIn



Or continue reading if you want to use a system that does 95% of the work for you at a fraction of the cost of doing it yourself



The slide features a blue vertical bar on the left with the text "LinkedIn Referral Marketing System" in white. A blue arrow points from this bar towards a list of bullet points on the right. The background is a light gray with a subtle grid pattern.

LinkedIn Referral Marketing System

- What if 95% done for you reducing your time and expense to a **fraction of the cost of doing it yourself**
- **Access to DOZENS of ready-to-modify templates** for attorneys, realtors, loan officers, CPA/EA/tax pros that avoid tax controversy engagements
- Connect with highly-desired potential referral partners EVERYDAY – **but just like a diet...**

REQUIREMENTS

- You need 5 minutes a day, really
- Need a smartphone (for LinkedIn app)
- Need to be responsive to inbound inquiries
- Need to be reliable and people-friendly

BAT Consulting Group - www.batcgi.com 18

What if 95% of what we discussed is done for you reducing your time and expense to a fraction of the cost of doing it yourself

What if you had access to DOZENS of ready-to-modify templates for attorneys, realtors, loan officers, CPA/EA/tax pros that avoid tax controversy engagements

While it is easy to Connect with highly-desired potential referral partners EVERYDAY – **there is a caveat...**

- If you diet 1 day a week will you reach your goals – **unlikely**
- If you diet 20/30 days month are you likely to reach your goals – **better chance**
- **Your stick-to-it-ive-ness** is key for success. To truly harness LinkedIn, you need to be active everyday, or every business day.

REQUIREMENTS

- **What if I said you only need 5 minutes a day to implement this system**, really
- Need a smartphone (for LinkedIn app)
- Need to be responsive to inbound inquiries
- Need to be reliable and people-friendly

Sound better? Surely.

Let's talk pricing



BAT Consulting Group - www.batcgi.com

19

Let's talk pricing

- We will help you build an **all-star** profile and **custom invites** you
- **We will invite 25 targeted potential referral partners each day**, at a 20% connect rate that's typically about 5 new connections a day. CPAS, realtor, attorney, loan offices LOVE to connect with other professionals.
- We will send a **custom thank you** and a follow-up message to your connections

We just calculated it could cost you nearly 10K a month at 25 invites a day if you could even do it consistently.

- What if I said you can get all these LinkedIn processes, basically everything I discussed today, not for 10K a month nor 5K a month - **but just \$497 month.**

That's adding roughly 100 new potential referral partners a month. That is getting you in front of hundreds or more LinkedIn members a month expanding your brand. If just 2 or 3 each month become real referral partners – it's a windfall.

Let's talk pricing



BAT Consulting Group - www.batcgi.com

20

There is also an upgrade plan.

After you get your feet wet and want to put the pedal to the metal, you can upgrade to the Gold package for just \$100 more and get 50 invites a day sent.

This is great way to expand your locations or just build your network twice as fast.

Is it right for
you?

If you thrive on networking, meeting new people, developing shared interest, and have a drive to expand your practice – you may be a good fit.

- **Next Step**

- Apply for a FREE consultation to determine if this networking system is a good fit for you

- **Getting started**

- Spend about 1 hour onboarding in 2 sessions
- Spend about 5 minutes-a-day working the system
- Prospect engagement time is all on you

So, if you thrive on networking, meeting new people, developing shared interest, and have a drive to expand your practice – you may be a good fit.

The next step would be to speak to me directly to see if this system is right for you and I will tell you if it is NOT a good fit.

For those that move forward, you will need to schedule two onboarding sessions about a half hour each.

Once we go live, you will need about 5 minutes a day – plus any time furthering relationships just like you would do for any business growth plan

Next Steps

Apply For Your FREE No-hassle Consult Here

- Again, all plans are M/M, cancel or upgrade anytime
- Setup fee waived (\$149 value)

Leverage LinkedIn like a pro and grab control of your local market (before someone else does)

THANK YOU

BAT Consulting Group - www.batcgi.com

22

I truly hope this was an informative read for you. At a minimum you have a much better understanding about how to leverage LinkedIn to build a large referral network and grow your practice.

Click the **consultation** button and schedule your consultation or visit:
<https://batcgi.as.me/schedule.php>

I look forward to speaking soon. Best wishes for a healthy and prosperous year ahead. Hope to see you on LinkedIn.

Bob Torella MBA
631-760-5440