



Sigma Tax Pro's Guide to Business Social Media



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SIGMA

Social media has evolved into the largest communication platform in human history, with over 2 billion active users on Facebook and more than 1 billion monthly users on Instagram, according to Meta analysis.

Establishing a presence for your tax business on social media is essential to engage with your existing clients where they are most active, and potentially attract new taxpayers.

Most social media platforms provide business pages that enable you to connect with your audience.

In this Sigma Tax Pro guide, you will learn how to create business pages for **Facebook**, **Instagram**, **X**, **YouTube**, **TikTok**, **Threads**, and **Google My Business (GMB)**.





Set Up Your Facebook Business Page

Connecting with customers on Facebook is essential for businesses today. Set up a Facebook Page for your tax business to build an online community. Your page makes it easy for taxpayers to find your business and get in touch.

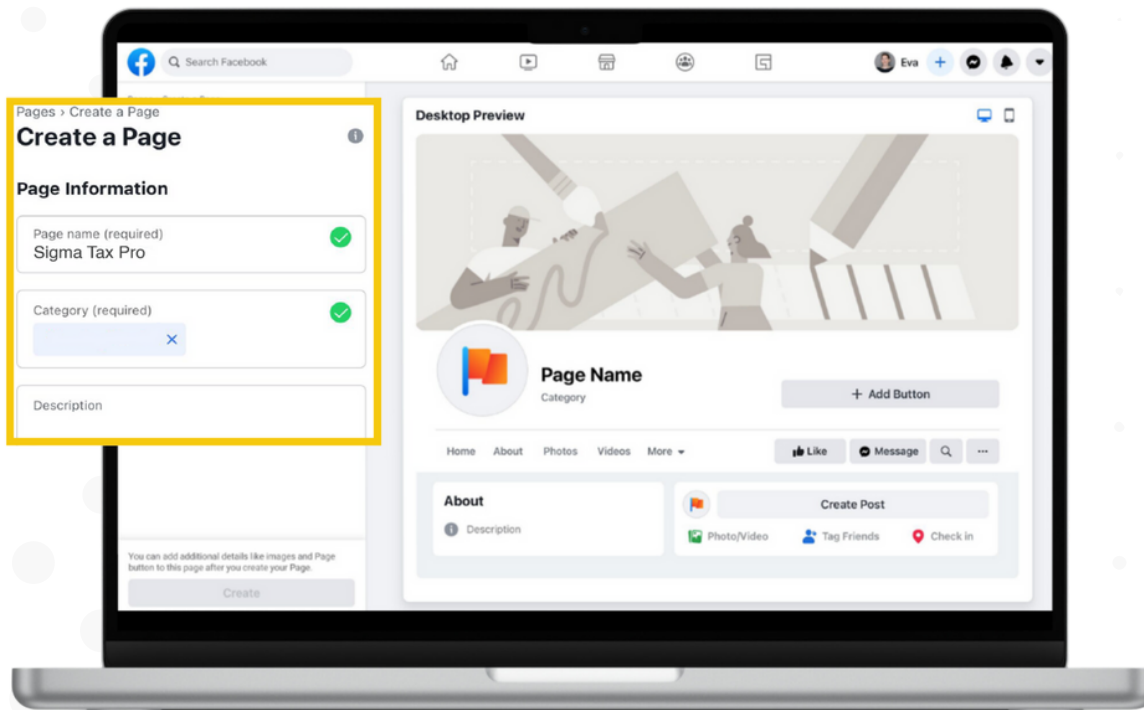
Use your page to share posts that highlight your services, i.e: **tax preparation**, **audit assistance**, etc... as well as your brand story.

Posting engaging content will help you establish a presence on Facebook and nurture relationships with your audience and maintaining it is a valuable way to increase visibility, foster loyalty, and drive sales.



Create a Page

From the homepage of your Facebook profile, click Pages on the left-hand panel. Then, scroll down and click **Create New Page**. Once you do, this window will appear:



Start setting up your page information by entering the name of your business under **Page name**.

Choose a category

Select one of the business categories that best represents your business. In our industry, the best description that fits your business is **Tax Preparation Service**.

Add a description that informs people what your services are. After you've done this, you can select **Create Page** at the bottom of the panel.

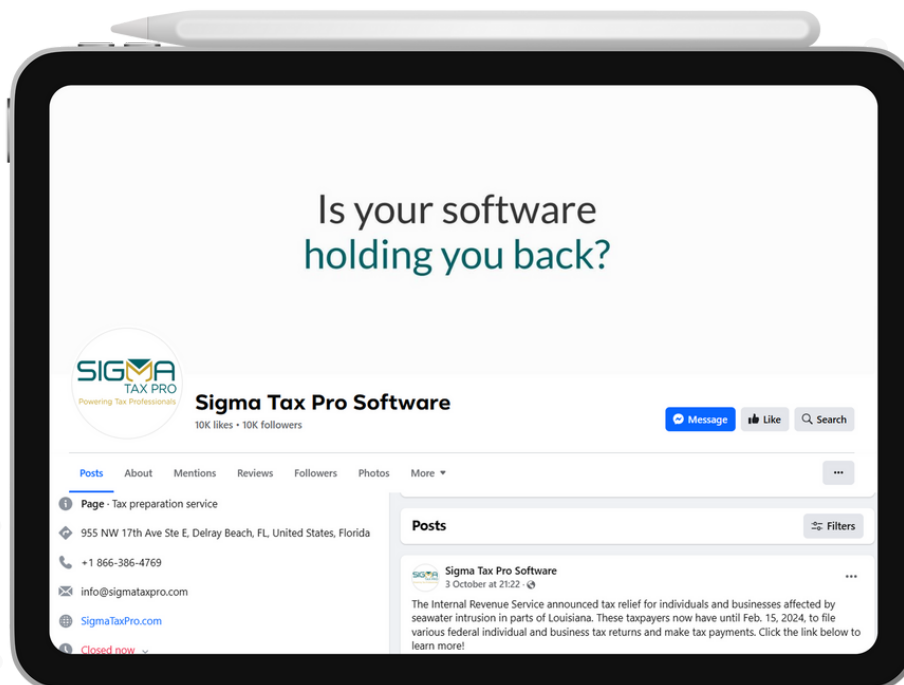
Establish your identity

Once you've successfully set up your page and entered essential details about your tax business, you can choose a profile picture to symbolize your tax business throughout Facebook; it can be your business logo, for example. Also select a cover image for your page.



Get Started

- Say Hi!**
Post to greet your page visitors and let them know that your tax business is now on Facebook. You can also pin your welcome post to the top of the page so people can easily find it.
- Grow your tax business page**
Invite family members, friends and your existing clients to like your page. Aim to get at least **30** likes as you're getting started.





Set Up Your Instagram Business Page

Leverage Instagram's focus on visual storytelling to connect with your audience. Creating an Instagram business profile allows you to share photos and videos that highlight your services and brand personality.

The highly engaging nature of the platform makes it easy to build relationships through likes, comments, and direct messaging.

Use Instagram to give followers an inside look at what makes your tax business unique. Share content to foster a sense of community. Craft visually appealing posts that capture attention and drive traffic to your website or have viewers call you to ask questions about your tax business.

An active presence on Instagram can help turn casual viewers into loyal customers through meaningful interactions centered around captivating visual content.

Download the Instagram App

First, download, the Instagram app from your **App Store** if you use an iPhone, or **Google Play Store** if you use Android.

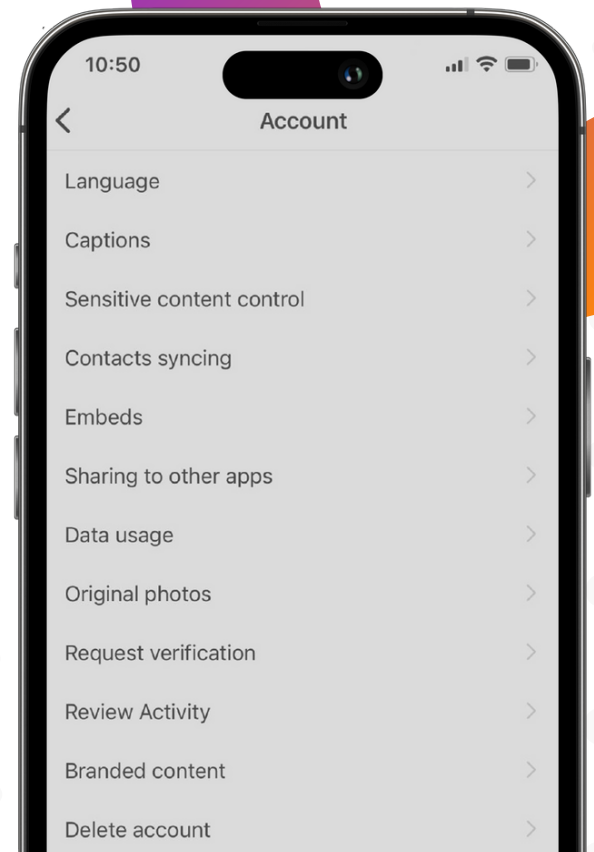
Set up your business account

Once the app is installed, open your new account's profile and tap the **menu icon** in the top right corner, then:

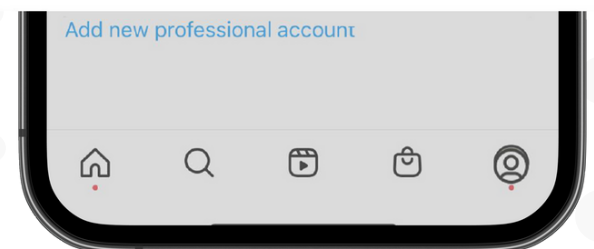
- Tap **Settings**.
- Tap **Account**.
- Tap **Switch to a professional account**.

Set up your profile

Setting up your Instagram business profile is straightforward. You'll need to choose an account username and upload a profile photo that represents your brand. Write an engaging bio that summarizes what your tax business offers; probably include your working hours so viewers know when you're open for business. Make sure to add your website URL so viewers can easily learn more. Consider including a call-to-action button like "Contact Us" to prompt visitors to engage further. Customizing these basic profile elements helps craft your brand identity on Instagram and gives followers clear ways to interact with your business.



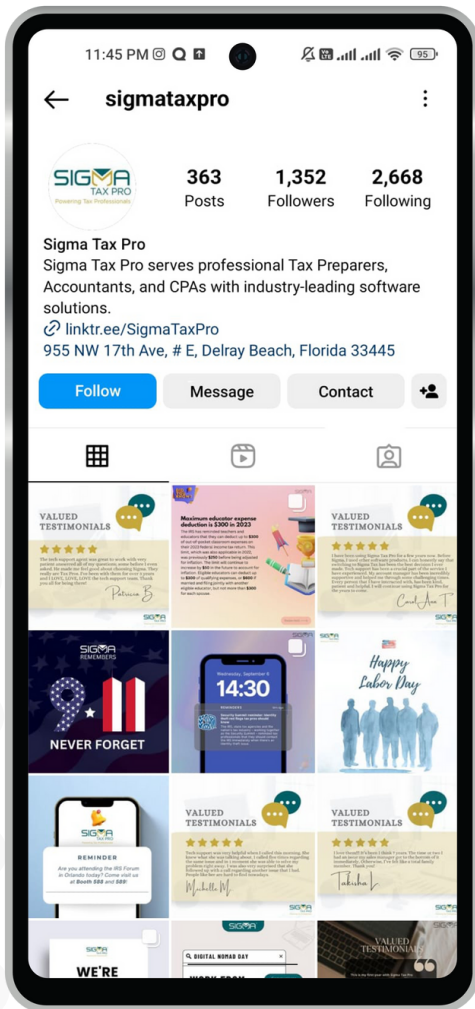
[Switch to professional account](#)





Connect your Instagram to your Facebook Page

When setting up your Instagram business profile, you'll have the option to connect it to an existing Facebook Business Page. It's highly recommended to link these accounts. Having your Instagram and Facebook profiles connected allows you to more easily manage and coordinate your social media marketing. Cross-posting content saves time and effort while enabling you to reach both audiences simultaneously.




Get Started

- **Follow people and business accounts:** Make sure to follow industry leaders and businesses, partners, influencers and competitors on Instagram. Engaging with their content can spark ideas for your own branded posts. The **Explore** page is also great for discovering relevant accounts to follow. Building a strategic following fuels inspiration and networking opportunities.
- **Invite people to follow you and engage with your content.** Prompt audience engagement through your Instagram posts and Stories. Ask questions that invite conversation. Run polls to survey opinions. Repost user content to highlight community. Responding to comments builds relationships. Craft an interactive, approachable presence.
- **Stay active** by consistently posting photos, reels, and stories.





Set Up Your X Business Page

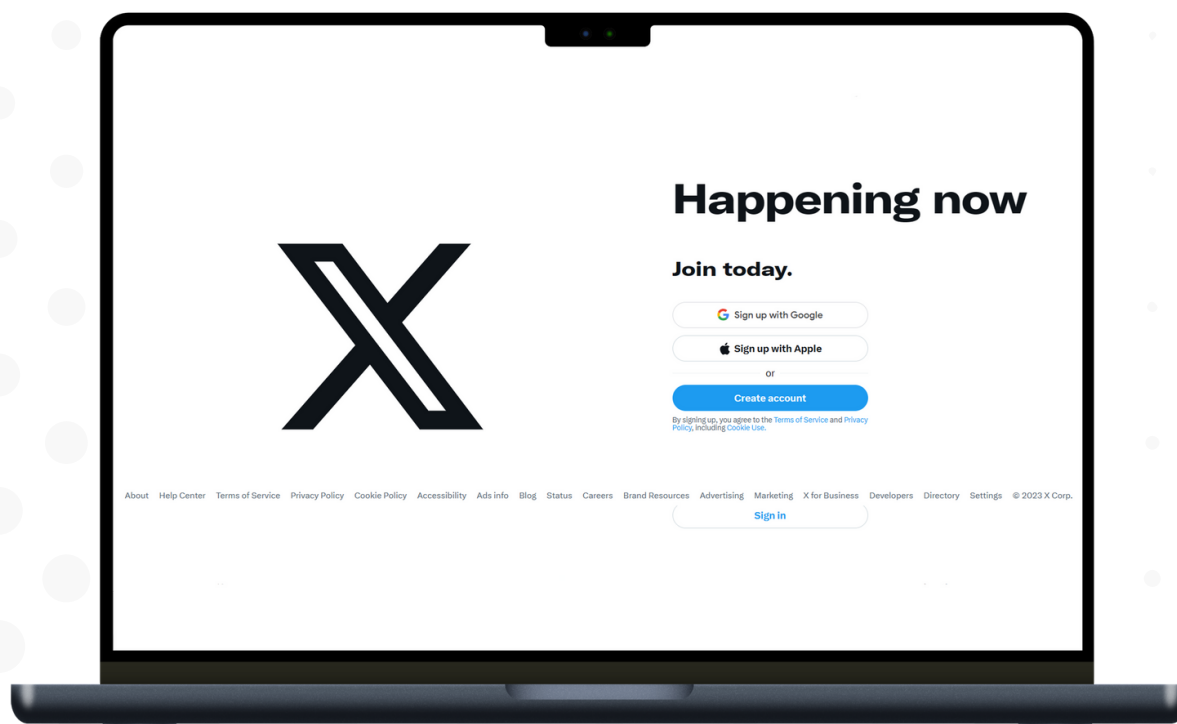


X (formerly known as **Twitter**) presents a valuable opportunity for businesses like yours to engage in real-time conversations. Showcasing your business' personality allows you to connect authentically with new audiences. Use X to provide timely customer service, announce new products, and interact personally with your community. Joining relevant discussions raises your visibility while monitoring brand mentions enables quick responses. X facilitates an ongoing dialogue that gives customers a direct line to your brand. Leverage the platform's immediacy to boost awareness, shape perceptions, and drive loyalty through transparent engagement.



Create your account

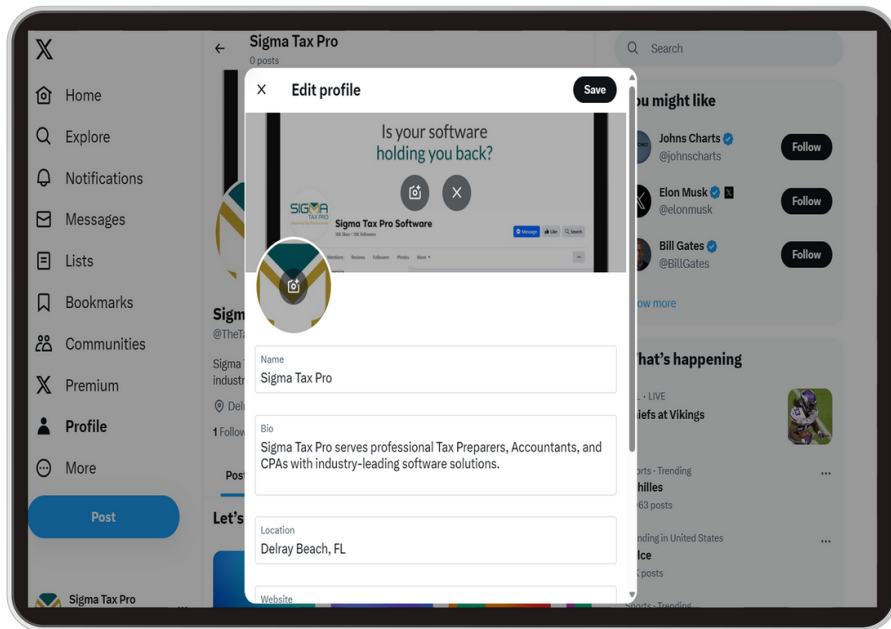
Getting started on X is straightforward. Visit the homepage and click **Sign Up** to create your account. Provide some basic personal details, which remain private. After verifying your information, it's time to optimize your brand presence. Start customizing your profile by selecting an appropriate username and image that reflect your business. Put together an engaging bio that summarizes the services your tax business provides. Link to your website so visitors can easily learn more. Setting up these core profile elements helps establish credibility and your unique voice on the platform.



Customize your profile and establish your identity

- **Profile and Header Photos:** As you set up your X account, establish your brand identity by uploading a profile picture and header photo that visually represent your tax business. That could be a logo and a photo of your tax office, for example.

- **Your X username, or @handle,** will become part of your unique profile URL. Choose something recognizable that represents your brand identity. Your display name appears alongside your **@handle** on your profile. Set this as your official business or brand name for clarity. Your **@handle** and **display name** work together to identify your business on **X** so visitors immediately know they've found your authentic company profile.
- Write a **160**-character bio that summarizes your tax business. Explain what you do and why someone should follow you. Include your **location, website, and contact info** so visitors can learn more. An optimized profile introduces your brand on **X**.



Get started on X

Pin key tweets to the top of your profile to highlight relevant updates. Useful pins may announce promotions, events, new products, or other important messages. To pin a tweet, simply click the **menu** icon in the top-right corner and choose **"Pin to profile page."** This will sticky the post so it's prominently displayed when visitors land on your page. Pinned posts/tweets allows you to continually feature your most timely content.

Set Up Your TikTok Business Page

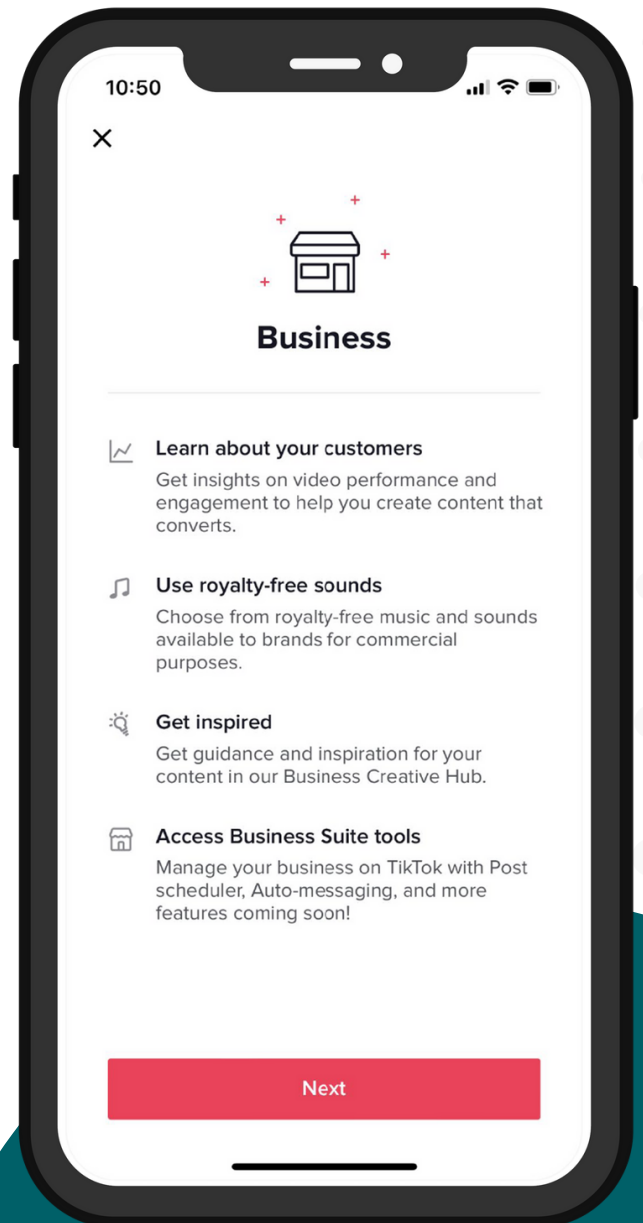
TikTok's short video format makes it easy for brands to showcase creativity. Post fun, engaging content to reach TikTok's massive global audience. The platform's highly shareable bite-sized videos allow you to be discovered by new audiences. Experiment with viral trends to reveal your tax business' personality. Use humor and entertainment to authentically connect with viewers. TikTok's casual, lively environment provides a refreshing way for your tax business to generate buzz and loyalty through creative and memorable videos.

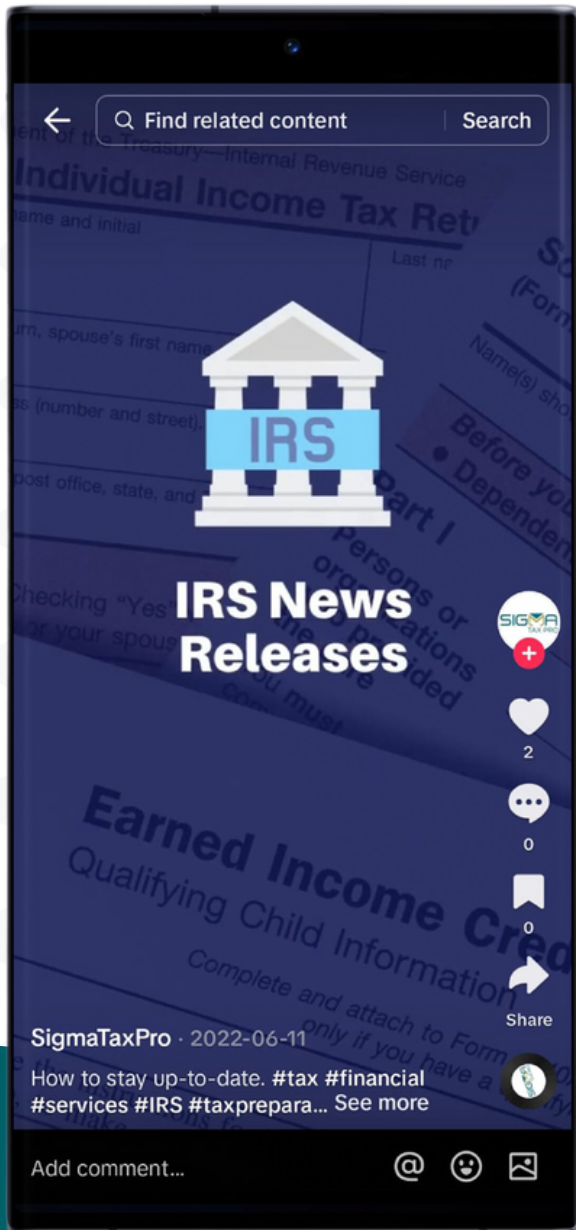


Create an account

Go to your device's app store and download the **TikTok** app. Here are the steps for creating a business account:

- Tap **Me** in the bottom menu bar
- Tap **Sign Up**
- Within the app, click the ellipses on top right of the Me page
- Tap **Manage my account** and select **Business Account** under **Switch to Pro Account**.
- Select a category best aligned with your business to receive customized content, events and solutions.





Get Started on TikTok

- **Engage with others on TikTok.** Respond to comments. Join in on viral trends. Use interactive tools. Showcase your tax business' personality through involvement with the community.
- **Post short videos** tailored to TikTok's on-the-go format. Showcase your tax business' creative side through fun content. Use TikTok's built-in editing tools or third-party apps to enhance your videos with effects, text, and music. Craft thumb-stopping clips optimized for the For You feed. Experiment with popular trends and challenges to engage viewers. Videos under 60 seconds have the highest impact.
- You can always refer to TikTok's business resources. Check out [TikTok Creator Marketplace](#), [Business Creative Center](#) for video inspiration, and the [TikTok Small Business Resource Center](#) for tips on how to grow your account.

Set Up Your Threads Business Page

Threads is an online social media and social networking service operated by Meta. The app offers users the ability to post and share text, images, and videos, as well as interact with other users' posts through replies, reposts, and likes. Think of it like a blend of Facebook, X, and Instagram at the same time. The platform is new, so, don't waste the chance to sign up and establish presence there as soon as you get a chance.



Create a Threads account

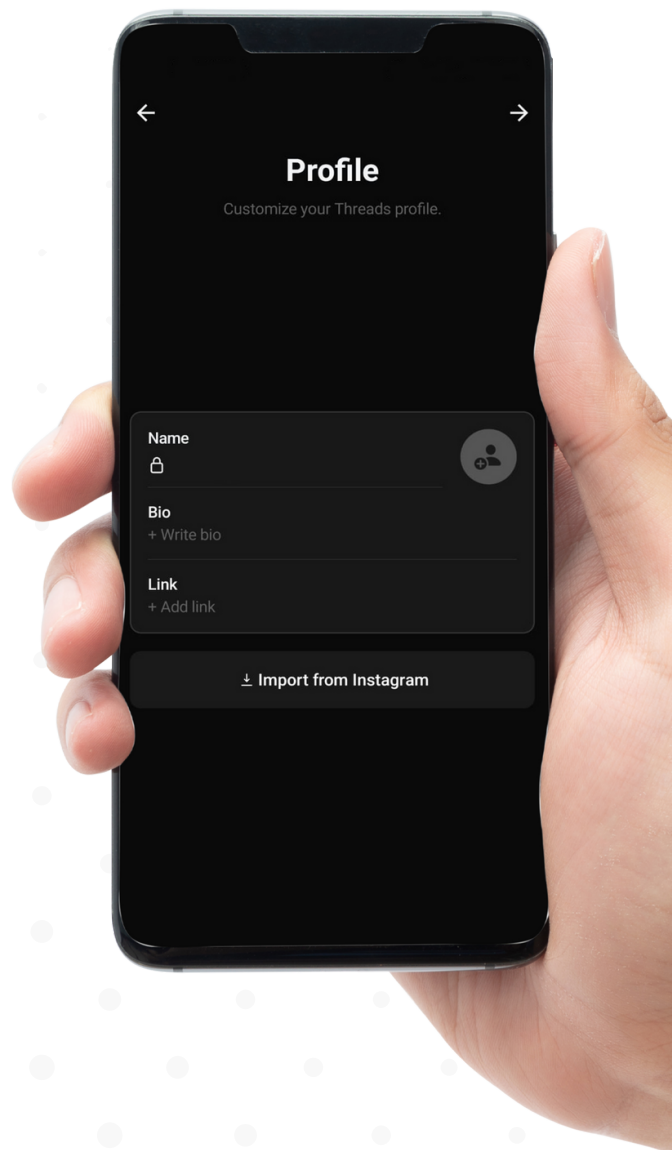
Go to your device's app store and download the **Threads** app.

Threads doesn't have the feature of business accounts yet, however, to reserve the name of your business, or use the app:

- Tap **Log in with Instagram**.
- Your name will be imported from Instagram. You can also choose to import your Instagram bio and link, or enter new ones.
- Tap the **profile button** on the bottom right side.
- Tap **Edit profile**. Add a profile picture that represents your tax business, and a link to your website (if you have one), or to your other pages.

Get started on Threads

Engage with others by following businesses that are related to yours in any way. Post photos, interact with others' posts, and use the short-form text posts; maybe for posts that can be anything from recent business news, to when you're open for business, and everything in between.





Set Up Your YouTube Business Account and Channel

With over 2 billion users, YouTube is ideal for businesses to showcase themselves through video. Users upload 500 hours of content per minute, so discovery is high. Creating a branded channel lets you publish promotional videos in a centralized, searchable hub. Share engaging content to build an audience. Promote your videos to convert viewers into loyal subscribers. YouTube's massive reach makes it a critical platform for video marketing and establishing a name for your tax business.



Create an account

To create a business YouTube Channel:

- Sign in to YouTube on a computer or a smartphone using a Google Account
- Go to **channel list**
- Click/tap **Use a business or other name**. This will lead you to a screen where you can enter the name of your business

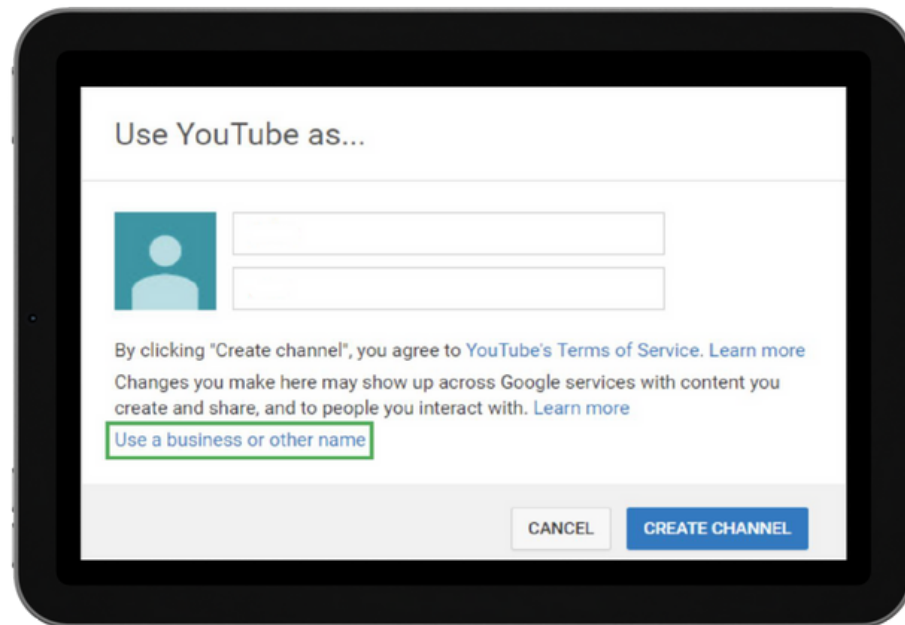


Quick tip

Consider making a separate Google account just for managing your YouTube channel, especially if collaborating with others. This helps keep your personal and professional videos, data, and settings compartmentalized. Having a dedicated brand account protects your privacy while allowing multiple team members secure access for easy collaboration. Keeping your personal and YouTube accounts separate also enables you to maintain brand consistency as multiple admins engage with the channel.

Create a YouTube channel

- Once signed into YouTube, click/tap your profile picture, then select **"Create a Channel"** from the menu.
- Customize your channel details for optimal brand presence. Pick an appealing profile picture and channel layout. Write a descriptive summary of your content niche/industry. Link related accounts to cross-promote.



Tips for starting

- List contact details so viewers can reach your business. Add your website, email, and social media links. Writing a compelling bio is also key. It should reflect your brand personality and video topics. An optimized channel provides multiple ways for viewers to connect while establishing your niche with a descriptive overview. Clear branding and contact info enables audience engagement and may convert viewers into clients.
- Use professional, high-quality images that represent your brand for the channel icon and artwork. Consistent visuals strengthen your identity. Follow [YouTube's recommendations](#) for optimally sized images.

Get started on YouTube

To create a business YouTube Channel, you should:

- Follow channels in your industry or related to your tax business, including competitors, partners and influencers. Like and comment on their videos to signal you're an engaged member of the YouTube community. Regular involvement beyond just posting your own content helps build relationships. Even if not uploading frequently, being an active audience participant boosts your credibility and visibility within this interconnected ecosystem.
- Strategize what videos to upload that highlight your business. Will you reuse existing footage or produce new content? Consider relevant options like tax preparation tutorials or customer testimonials. Planning content that uniquely showcases your services and tax business helps attract viewers. Think through the types of informative or engaging videos that best reflect your persona.
- Create a trailer for your channel. Edit and upload a short video/trailer that supplements your channel's About page, and introduces first-time visitors to your channel and your tax business. To upload a channel trailer, go to **YouTube Studio** and from the left menu select **Customization** > **Layout**. Then, under Video spotlight click **ADD** and upload you channel trailer.



Set Up Your Google My Business

Google My Business (GMB) is a valuable tool for promoting your tax business to potential clients and optimizing your online presence. By claiming your business on **GMB**, you're essentially putting your tax business on the map, literally. When potential clients search for tax services in your area, a verified **GMB** listing will ensure that your business shows up in local search results. To get started with Google My Business, follow these steps.

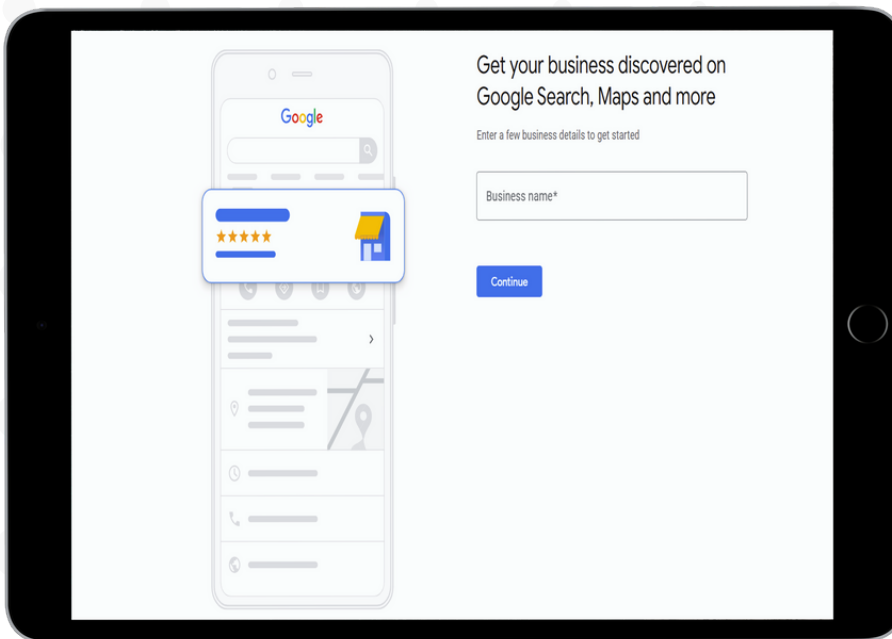


Claim your business on Google My Business (GMB)

To claim your business on **Google My Business (GMB)**

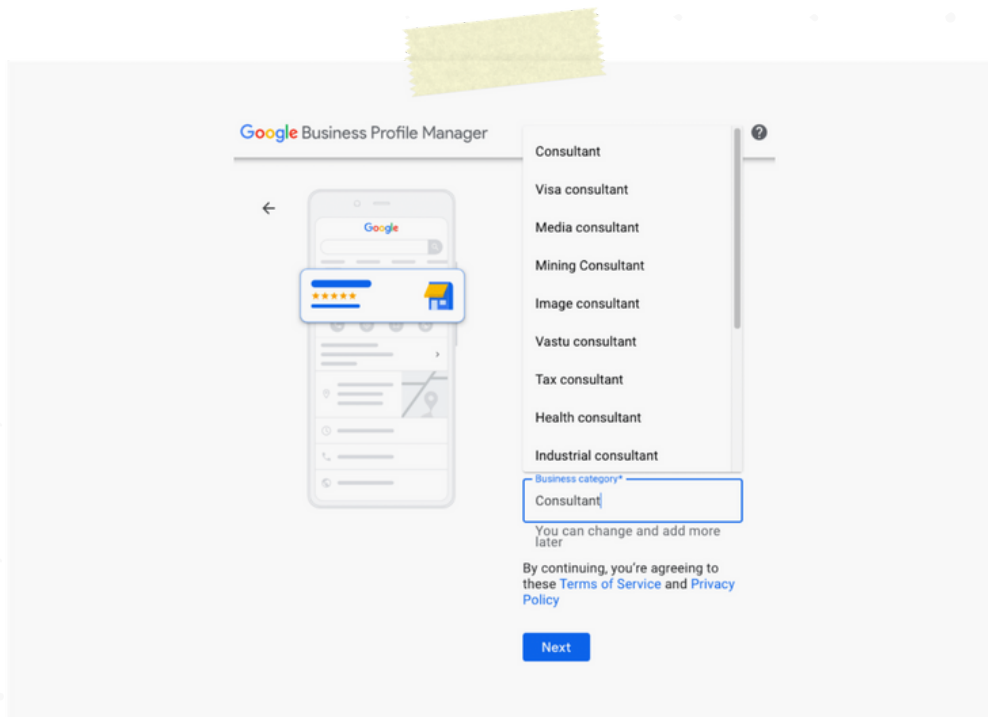
- Go to google.com/business and click **Start now** at the top right corner.
- Sign in to your Google Account, or create one if you don't already use Google services.
- Enter the name of your business and click **Next**.

Note: You can also select your business from the suggestions that appear as you enter information.



- Enter the name of your business and click **Next**. You may also be asked to position a marker for the location; of your business on a map.
- If you manage a [service-area business](#), follow these extra steps:

- Check the box for ***I deliver goods and services to my customers.*** Optionally, check the box for ***Hide my address (it's not a store)*** Only show region.
- Click **Next**
- Select a delivery area option and click **Next**.
- Use the search field to select a business category and click **Next**.



- Enter a phone number or website URL for your business, then click **Next**.
Note: You'll also have the option to create a free website based on your information.
- Enter a phone number or website URL for your business, then click **Next**.
Note: You'll also have the option to create a free website based on your information.
- To complete sign-up and verify your connection to this business, click **Continue**.

Verify your Business

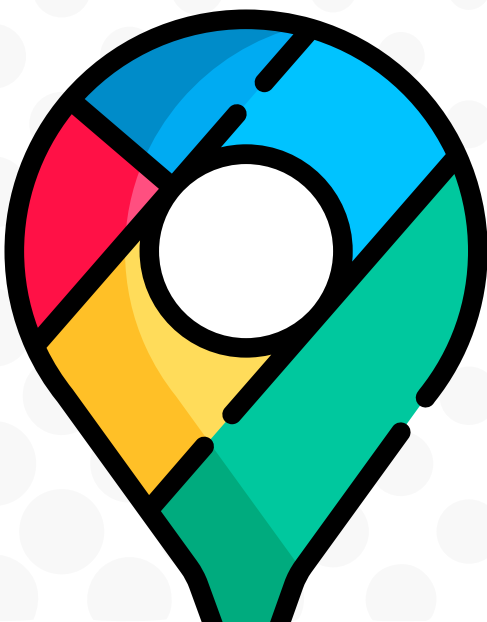
- To verify at another time, select Try a different method and click **Later**. If you're not authorized to manage the business, find the person in your organization who's authorized and continue the process.

What if someone else claimed your business?

If you see a page that says *"This listing has already been claimed."* click **Request access** and follow the directions to claim your business. Learn more about [requesting ownership](#).

Get started on Google My Business (GMB)

Incorporating high-quality photos of your office, staff, and services into your Google My Business profile not only enhances its visual appeal but also conveys the professionalism and legitimacy of your tax business. Engaging with customer reviews and fostering positive feedback acts as word-of-mouth recommendations, reinforcing your tax business's reputation and trustworthiness among locals. Consistently posting updates on tax-related topics, promotions, and community events keeps your GMB profile fresh and active, ensuring it remains visible to potential clients. By utilizing GMB insights, you gain valuable data on how clients discover your business, helping you refine your strategy based on the most effective search terms and locations. Timely responses to client questions demonstrate your commitment to exceptional customer service, providing valuable information to those inquiring about your services.



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