

Robb Tyson

Age 54

Designation CPA

Title Business owner

Percentile 15% of users

High Score Knowledge seeker

Low Score Deal seeker

Busy

Competitive



Motivations

Gives back to the community (doesn't volunteer)

Knowledge seeker/sharer

Purchase based on company reputation

Peer reputation

Career credibility

Behaviors

- Takes on-demand education
- Reads NATP publications
- Calls research
- Promotes NATP
- Regularly accesses information
- Doesn't care about saving money

Bio

Robb works many hours for his company, but giving back to the community is also a priority. He is competitive, so he needs help with work/life balance. High quality is important to him as well as working with reputable business partners. He's a mentor at his firm and always shares information. He expects great customer service and acknowledgment from representatives who remember his name. He wants education on-demand, when he needs it. Robb uses NATP research. He keeps updated with the TPW and values the print publications as the articles are more in depth.

Andrea Hartwig

Age 45

Designation EA

Title New business owner

Percentile 17% of users

High Scores Live education & webinar user, high spender

Low Score Deal seeker

Learner

Tech-savvy



Motivations

Volunteers

Knowledge seeker/sharer

Career credibility

Peer reputation

Behaviors

- Takes in-person and online education
- Wants immediate information and updates
- Looks for ways to work with other professionals, in person or online
- Regularly accesses information
- Concerned more with quality than price

Bio

Andrea recently started her own business and is a member of multiple organizations. She attends live education to meet her requirements. She looks for networking opportunities both in person and online. She wants to be seen as a reputable tax professional and be recognized by her peers. Andrea is a chapter leader and has many friends in the industry. Andrea follows social media to get information quickly, is tech-savvy and looking for opportunities to interact with NATP through technology.

Since she recently opened a new business, she needs help attracting and retaining clients. When volunteering, she struggles with the old regime of volunteers. She strives to get new volunteers in her chapter. Andrea struggles with the increase in compliance and due diligence requirements. She would like her clients to be more organized and wants to move to a paperless office, but is searching for ways to make that happen.

Theodore Edwards

Age 72

Designation CPA

Title Semi-retired

Percentile 12% of users

High Score Responds to surveys

Lowest Score Education user

Expert

Works independently



Motivations

Knowledge seeker/sharer

Staying up-to-date

Career credibility

Have opinions heard

Behaviors

- Reads NATP publications
- Conducts own research
- Regularly accesses information
- Not purchase-loyal
- Not interested in being published or serving on a committee/volunteering
- Not as concerned with peer reputation

Bio

Theodore is an active senior who completes crossword puzzles and reads the NATP publications to keep his mind sharp. Although he is reducing his client load, he cares about his few remaining clients that he's serviced for 25+ years and is diligent about expertly filing their returns. When faced with a tough tax issue, Ted relies on our publications and online resources to answer questions. Ted is considering his succession plans, but keeps procrastinating on making decisions.

Joe Whitman

Age 59

Designation None

Title Sole proprietor

Percentile 21% of users

High Score Deal seeker

Low Score Research user

Confident

Thrifty



Motivations

Knowledge seeker/sharer

Saving money

Staying up-to-date

Career credibility

Behaviors

- More likely to register for the AFTR
- Has not used our education
- Reads NATP publications
- Conducts own research
- Regularly accesses information
- Does not volunteer or network

Bio

Joe's priority is to maintain his business using the information and education included in his membership, with thriftiness being his top priority.

He's been a tax preparer for a long time and is confident in his skills. He has built a solid client base, so there's little that he needs from NATP, but he loves a good deal. The benefits that come with membership are very important to him—he becomes frustrated when he has to pay more for education and information.

Joe is a loyal member, but it's likely that he might consider other professional associations or organizations if they offer education and information at the low price he demands.

Diana Cambridge

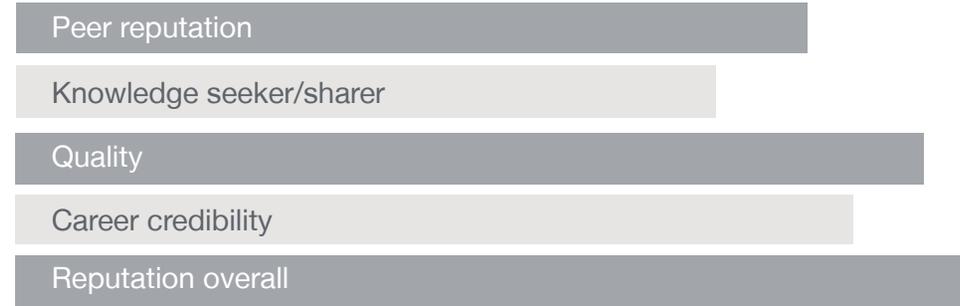
Age 68
Designation EA
Title Small business owner
Percentile 16% of users
High Score High spender
Low Score Volunteer

Professional

High standards



Motivations



Behaviors

- Attends in-person education, Conference and webinars
- Calls research
- Purchases from the Tax Store
- Doesn't care about saving money
- Not interested in being published or serving on a committee/volunteering

Bio

Diana is a well-respected tax professional who has provided decades of service to her clients. Belonging to NATP supports her desired reputation as a tax expert and leader in her community. While she's not heavily involved in NATP at a local level, she is charitable when it comes to her neighbors and clients.

She is a firm believer in continuing education and learning for both herself and her staff. She is willing to invest in relevant and quality education, even if it comes at a higher price. She is tech-savvy for her generation and would be a prime candidate for new learning and information delivery methods.

Maggie Jackson

Age 42

Designation AFSP

Title New business owner

Percentile 20% of users

High Score Promoter

Low Score Conference attendee

Aspiring expert

Small budget



Motivations

Recognition

Knowledge seeker/sharer

Staying up-to-date

Peer reputation

Behaviors

- Recently became a member
- More likely to register for the AFTR
- Looks for networking opportunities
- Promotes NATP
- Regularly accesses information
- Low spender
- Uses self study and would consider Tax Forums

Bio

Maggie has been in the profession for awhile as an employee of a franchise. She recently decided to leave and start her own business in her home office. She is hoping to build a year-round business that includes payroll, bookkeeping and consulting work in addition to preparing taxes. She is curious about earning the EA designation, but she's focused on building her clientele.

Because she's a new business owner, she doesn't spend a lot of money on education or other products. However, once a year Maggie splurges on traveling to the Tax Forums to learn more and to pick the brains of other solo-practitioner experts.