Real-Time Tax Debt Leads Vs. Aged Tax Debt Leads Vs. Tax Debt Call Transfers: Which Fits Your Sales Strategy?

Description

By James Schulze

This article discusses the three main types of federal income tax debt leads â?? real-time, aged, and call transfers â?? their advantages, and how sales strategy may differ for each lead type. It also touches on how companies can build an optimal mix of leads for their sales operation and the different metrics they should track to evaluate lead performance.

Tax resolution companies have several options when buying tax debt leads. The right choice depends less on which lead is best and more on how the companyâ??s sales operation is built.

At The Leads Warehouse, we have worked with tax resolution companies for more than 20 years. We offer real-time tax debt leads, aged tax debt leads, and tax debt call transfers. Real-time and aged leads can include consumer tax debt opt-ins and federal tax lien data, while call transfers put an interested consumer directly on the phone (read our blog, â??What Are Federal Income Tax Debt Leads? A Guide For Tax Resolution Companiesâ?•).

Each lead type has different economics, consumer intent, available volume, and sales requirements. Matching the product to the sales operation is critical. Understanding the tech, and specifically the telephony requirements of each tax lead type is equally important.

Real-time tax debt leads for fresh opportunities

Real-time tax debt leads can include consumers who have just opted in to request tax debt assistance as well as consumers with newly filed federal income tax liens. With an opt-in real-time tax debt lead, the consumer has expressed interest in getting help with federal income tax debt. Depending on the campaign, the lead can be a co-reg tax debt lead or a form-filled lead. Newly filed tax liens represent a different opportunity. The consumer has not necessarily requested assistance, but the recent filing provides a timely signal that a tax debt problem exists.

In both cases, timing is important. Fresh opt-in tax leads should be contacted quickly while the consumer is most likely available. With up to **75%** of opt-in leads being contacted via phone, reaching out to the consumer within seconds of the lead posting significantly increases connection rates. With only seconds passing, it is highly likely the consumer will still be near their phone when the debt resolution company calls them.

Newly filed liens are based on current tax debt filings, thus they are extremely accurate. As tax lien records age, the tax debt could be paid off, lifting the lien. Newer tax debt liens are more expensive than aged filings; it does not make sense to buy a new federal income tax debt lien list and let it sit.

The secret behind making real-time tax debt leads works is the instant connection. They work best for companies with the staffing, technology, and sales process to respond quickly. This includes a dialer that allows for the posting of real-time leads, triggering an instant call on a dedicated campaign.

Aged tax debt leads for lower cost and greater scale

Aged tax debt leads include older consumer opt-ins and tax liens filed previously. An aged opt-in lead is someone who previously expressed interest in tax debt assistance but did not necessarily become a customer. An older tax lien identifies someone with a known tax issue, although the current status of the debt may need to be determined.

Tax debt is particularly suited to aged lead marketing because the underlying problem can persist. Someone who owed the IRS several months ago may still owe money today. The consumer may have delayed taking action, tried to resolve the problem independently, or talked with another tax resolution company without moving forward. Since aged tax debt leads are consumers with federal income tax debts greater than **$10,000**, it can take up to 2 years to resolve the consumerâ??s tax debt. The additional time is primarily due to the Notice of Federal Tax Lien being filed.

The key advantages of aged tax debt leads are **cost and scale.** Lower lead costs allow tax companies to purchase more opportunities with the same marketing budget. The tradeoff, though, is sales effort. Aged leads work best for companies with outbound dialing capacity, good scripts, CRM automation, and persistent follow-up. Buying inexpensive leads only works when the sales team has the ability to work them effectively. Most tax companies that buy aged tax debt leads have an opener-closer model, in which the tax lead is first called by an opening sales agent and then transferred to a closer.

Tax debt call transfers to start with a conversation

Federal income tax debt call transfers solve a different problem. Instead of purchasing lead data and attempting to establish contact, the tax resolution company receives a live consumer on the phone. At The Leads Warehouse, tax debt call transfers include a **120-second buffer**, giving the buyer time to speak with the consumer before the call becomes billable. With real-time and aged tax debt leads, the buyer still has to turn a lead into a conversation. With a tax debt call transfer, the conversation is already happening.

The higher level of contactability comes at a higher cost. For companies with strong closers but limited outbound infrastructure, however, the economics can make sense. Rather than investing heavily in dialing and front-end prospecting, the company can focus its resources on converting live conversations into customers.

Tax resolution firms that optimize tax debt transfers focus on the buffer script as much as the closing script. A well-rehearsed buffer script allows a tax debt company to properly screen the consumer and end lower-quality calls before they become billable. When reviewing tax debt transfers, resolution companies should focus on calls lasting **3 to 5 minutes**. Optimizing these tax debt transfers to a call under 120 seconds allows the tax resolution firm to focus on better tax debt transfers that are most likely to close.

Match the tax debt lead to the sales operation

A tax resolution company with a strong outbound sales floor may perform well with aged tax debt leads. Lower lead costs allow the company to buy a greater volume of aged tax debt leads, while its sales operation creates value by turning that volume into conversations. Dialing aged tax debt leads requires excellent caller ID management to ensure the â??spam likelyâ?• label isnâ??t attributed to the outbound DID. An individual DID can be labeled spam likely after as few as **50** calls.

A company built around speed-to-lead may prefer real-time tax debt leads. It pays more for fresh opportunities, but its representatives can respond while consumer interest is recent. At The Leads Warehouse, when reviewing client metrics, a tax resolution firm that dialed real-time tax debt leads within a minute of opting in enjoyed a **55%** connection rate. The same company calling real-time leads the next day, without a day 1 phone call, had a **1%** connection rate.

A company with strong closers but less outbound capacity may prefer tax debt call transfers. Acquisition costs are higher, but representatives spend more of their time speaking with consumers instead of attempting to reach them. Scripting still matters. For tax debt call transfers, the tax resolution company must have a tax debt qualifier script and a closing script, utilized by the same agent.

The product should fit the sales operation â?? not the other way around.

Opt-in tax debt leads vs. tax liens

There is also an important distinction between opt-in tax debt leads and tax lien data. An opt-in consumer has expressed interest in tax debt assistance. A tax lien is a data signal showing that a federal tax issue exists or existed, but it does not necessarily mean the consumer requested contact from a tax resolution company.

That difference should be reflected in a firmâ??s sales strategy. A fresh opt-in lead should receive rapid follow-up because the consumer recently raised their hand. A newly filed tax lien requires a different prospecting approach. Likewise, an aged opt-in lead represents previous consumer interest, while an older tax lien represents a historical tax debt signal.

Since federal income tax debt liens are not opt-in leads, a tax resolution firm can DNC (Do Not Call) scrub the leads if they are being called from a dialer. If a tax lien lead is not being called from a regulated auto dialer, or called by hand, then the TCPA may be irrelevant. Regardless of the tax debt lien type, the resolution firm should consult with a TCPA attorney to ensure compliance.

Understanding the source of the tax debt lead is just as important as understanding its age.

Compare CPA, not just CPL

Cost per lead (CPL) alone does not determine which tax debt lead source performs best. An aged tax debt lead may cost substantially less but require more dialing and follow-up. A real-time tax debt lead costs more, but the consumerâ??s recent intent can improve the opportunity to make contact. A tax debt call transfer costs more again, but the representative starts with a live conversation.

The more important measurement is **cost per acquisition (CPA).** Tax resolution companies should track lead cost, contact rate, qualification rate, close rate, and ultimately the cost to acquire a customer. A strong outbound operation may produce an excellent CPA from inexpensive aged leads, while another company may achieve a better CPA from more expensive real-time leads or live calls.

Build the right tax debt lead mix

Tax resolution companies do not have to choose only one lead product. Aged tax debt leads can provide lower-cost volume. Real-time tax debt leads can provide fresh opportunities. Tax debt call transfers can put live consumers directly in front of closers. The Leads Warehouse offers all three because different sales organizations require different opportunities. A company can also combine them, using aged leads for scale, real-time leads for fresh intent, and call transfers to keep closers speaking with qualified prospects.

The goal is not simply to buy the cheapest tax debt leads or the highest-intent leads. It is to match the lead source to the companyâ??s salespeople, technology, follow-up process, and available capacity. **The right tax debt lead is the one your sales operation is built to convert.** Are you ready to talk about how you can grow your tax debt sales pipeline?

About the author

James Schulze is the President and CEO of The Leads Warehouse, a marketing data company with over 20 years of experience in bringing lead generation solutions to companies selling into the home, automotive, financial, insurance, health and life, and legal sectors. He works directly with clients to optimize conversion strategies and ROI across multiple verticals.

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If you would like more information on how you can grow your tax debt relief sales, give The Leads Warehouse a call at **1-800-884-8371** or visit our website at https://theleadswarehouse.com.

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