



## Our checklist summary of Good Practice Marketing

If you are an R&D tax relief specialist, you know how important it is to promote your business and attract new customers. While it's important to get prospects through the door, the approach you take can have a big impact.

You may have seen marketing materials that exaggerate the boundaries of the R&D scheme. Your competitors might say they do 'all the work' for their clients. But misleading messages could lead clients to think their projects qualify when they don't, or that they don't need to take responsibility for the claim. HMRC are also on the lookout for dishonest marketing and could even report you to the Advertising Standards Authority!

With HMRC making changes to the scheme, it's not always easy to know

what to say. With help from our members, we have developed this checklist based on our [Good Practice Marketing Standard](#) to help R&D tax relief services identify problematic messages in their marketing materials.

This checklist can help you:

- Ensure that potential customers are fully informed of the demands of the scheme.
- Safeguard your business from unwanted attention from HMRC.
- Attract higher quality leads that have work that actually qualifies for R&D tax relief.

You can use this checklist to self-assess your website and other marketing materials.

## Good Marketing Tips

### Content and Messaging

When giving information about the eligibility criteria:

- Have you made clear that HMRC uses a specific definition of R&D?
- Have you explained this definition, even briefly?
- Have you provided a link to HMRC's definition of R&D?
- Do you use words like 'may' and 'might' when talking about eligibility?
- Are third party stats, facts, and figures on your website reasonably up to date?

Is your content free from suggestions that imply that:

- *"Most businesses will qualify."*
- *"Everyday business can qualify."*
- *"You can claim for improvements to your business processes."*
- *"If your product is new to market, you'll qualify."*

Are your selling messages free from:

- False scheme requirements e.g. *"You can claim if you have revenue of £2m+ and have been trading for at least 2 years!"*
- Scare tactics e.g. *"Government funds are running out, get your claim in today!"*
- Suggestions that you influence or are endorsed by HMRC e.g. *"We sit*

*on HMRC's Consultative Committee," "HMRC Approved."*

- Suggestions that the client won't be much involved e.g. *"Sit back and we'll handle everything for you"*
- Claims of 100% success rates

### People and Customers

When talking about your team:

- Have you shown the Directors or partners of your company?
- Have you shown your senior managers?
- If you employ ex-HMRC staff, have you given their names and explained their involvement in preparing and reviewing claims?
- Are your statements about team size and experience consistent with information in the public domain?
- Have you highlighted your membership of professional communities (such as The R&D Community)?

When using customer testimonials:

- Are these verifiable i.e. attributed to an identifiable person?
- Are your testimonials free from examples of boundary pushing?

## Next Steps

If you identified any issues with your marketing messages, you'll need to do some work to resolve them. If you're looking for some more information about the relationship between marketing and R&D tax relief, we have more resources available on our website.

- [The R&D Community Good Practice Marketing Standard](#)
- [What role does marketing play in the success of your R&D service?](#)

We've also developed a training course that covers the relationship between marketing and your R&D service in comprehensive detail - [How to Build Strong Ethics & Good Marketing Practice into your R&D Service](#).

This course is exclusively available to members of The R&D Community as part of our training catalogue. If you want to learn more about the benefits available to members, click the link below.

See membership  
& pricing details



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