Avoid These 6 Marketing Fails During Busy Season

It’s just around the corner, lurking, like a bad cold. Yes, it’s busy season. To keep your marketing momentum going during this hectic time of year for CPAs and financial professionals, avoid these six marketing fails:

1. **Not posting anything new on your website from January through April.** To prevent this from happening, begin writing content now, collecting images for replacement throughout the site, and updates to last year’s tax organizers you may have shared with clients. Finally, double check the site’s copyright to make sure it’s current.

2. **Holding all blog posts until after busy season.** Now is the time to begin writing blog posts. Review your blogging schedule to see what’s coming up. If you don’t have a blogging schedule, it’s easy to create. Include the blog title, first sentence, keywords, and resources used to create the blog. Have someone on the staff write it for you, or consider working with a copywriter or subcontractor to write the posts for you. Don’t miss this critical time to share helpful tips, how-to articles, and more that your customers may read and share.

3. **Forgetting to check the client portal or other links on your site.** You may think the link has always worked in the past, but when was the last time you checked? Have someone on your team go through the major links on the website, especially the client portal to make sure it’s working.

4. **Avoiding email and phone communication with non-tax clients.** It may be your busy season, but is it for your non-tax clients? Let’s say you have EBP clients, whose busy season is in July. Be sure to email or call at least one time per month to keep them engaged and to let them know you value their business and are there to help answer their questions.

5. **Delaying any marketing efforts until April or May.** If your firm’s bread and butter is tax season, continuing your marketing efforts during the busy season helps to draw
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your name to the top of the search engines. You never know for sure when a business is looking for a new provider. If you specialize in individual tax returns, this too will help with search rankings. Also consider social media advertising on platforms, such as LinkedIn. Keep these campaigns manageable, and follow them up with a larger, more visible campaign in the summer or fall months.

6. **Ignoring leads until after busy season.** You never know when you’ll get a lead, or where it might come from. However, ignoring a referral or warm lead during busy season could end up as a missed opportunity for business growth, additional referrals, or a new client.

**The Remedy**

To remedy those marketing fails, consider preparing your marketing efforts before year-end. Then, each month during busy season, schedule and implement at least one:

- **Website update,** such as a new photo, news items, or blog post. Below is a list of content elements to consider for your website posts and updates.

- **Email communication** to non-tax clients, encouraging them to plan for spring and summer deadlines. This is important for businesses with year-ends that don’t fall on December 31, for those companies with deadlines in addition to tax deadlines, and for non-profit organizations.

- **Marketing campaign to keep your brand on the search engine’s radar.** This could be as simple as a postcard mailer to your clients reminding them of upcoming deadlines and items to prepare, such as for audits. It could also be something online, like digital ads in LinkedIn or Google, focusing on the firm’s other services. These ads help increase your firm’s search engine ranking and inform your target market of all of your firms’ services.

- **Consultation with a potential new client.** Plan, in advance, those one-hour consults you should have with warm leads and referrals. If someone else in your office can schedule those and prep the lead with more information, delegate this task. If not, prepare a script ahead of time.

Remember, even though you’re busy, it’s harder to gain momentum once it’s lost than to keep it going once you have it.

**Additional Resources**

- [20 Favorite Marketing Content Formats](#)
- [9 Ways to Winterize Your Marketing Plan](#)
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- **Standardized Email Format Increases Client Engagement**