



The New Year is just around the corner. Here is a 2018 Marketing Prep Checklist you can begin working on now to meet the demands you'll face early in the year.

#### Website

- Update your site's copyright to reflect the new year and into 2-5 years into the future, e.g., © 2018 - 2022.
- Revise your site's SEO with new trending keywords that will help draw new leads toward your site, e.g., for Tax professionals consider terms like tax reform, projected tax rates, and 2017 tax changes. For other accounting professionals, consider terms that reflect changes in your industry, such as payroll deductions, fraud alerts, and more.
- Create landing pages specifically for early-in-the-year service, such as tax returns, year-end corporate returns, cloud-based services, and more.
- Archive outdated content (keep it stored in a cloud location or server in case it becomes relevant again).
- Adjust older content publish dates to late 2017 or early 2018 if the content is still relevant.
- Redesign old image formats to reflect new standards, which is really important for social media sharing.
- Construct a monthly website analytics report that is emailed to you on the first of each month so you can track website progress and traffic. You can set it up to compare month over month, or year over year.

## Content

- Develop new content that can be based on monthly themes throughout the year. There are many industry “weeks” or “months” that you can find using a search engine, e.g., Manufacturing Week is the first week of October. Provide tips or how to for those industries you support.
- Create short videos you can share on your website. For example, ask staff what their top 3 craziest tax-related questions have ever been. Video tape their responses. For months featuring parents, ask staff what was the best advice their “insert parent title” ever gave them or that they wished they’d listened to.
- Infographics are very popular on visual platforms and blogs and are great for social sharing. Consider creating a few of those highlighting business tips you’d provide to clients, such as how long do you keep business financial documents, or when should you consider exit planning?
- Downloadable content is great for lead generation. An easy way to create this is to take your best blogs in a topic area, such as real estate, and combine them in to a photo-filled ebook. Then create a landing page requiring at least an email address to download the ebook. Finally, add the names to your monthly newsletter to help increase leads.
- Build an enewsletter. If you don’t have an email newsletter, and one that is mobile ready, now is the time. There are many tools you can use to create newsletters, including MailChimp and Constant Contact. There are also services you can buy that will distribute a monthly newsletter for you.
- Collect company culture images. Company culture images also make for great social sharing content. This is most effectively used on platforms like Facebook, Instagram, and SnapChat; but can also be made into moving collages for video, which could be added to a YouTube channel.
- Prepare webinar or podcast content that may be recorded and distributed throughout the year. Make the more important information a paid service to help generate income for your firm.

## Print Materials

- Determine if outdated materials, such as a company brochure, should be redesigned and printed. Or, should you opt for an electronic version that can be updated easier and cost less?
- Revisit previous, successful print campaigns and consider doing them again to the same audience or in a different region to help generate new leads.
- Identify those items that could come off the print-materials plan, such as printed

newsletters that are mailed. Rather survey your clients letting them know you will be distributing an electronic version and have them sign up via email address or opt-out. If you give them a print option, they may still take it, which doesn't alleviate the cost.

### Event Planning

- Pinpoint events you plan to host, co-host, sponsor, or speak at. Begin developing the marketing plans around each event. Best-practice tip: Take the event launch data and back up about 10-12 weeks. That's when the promotion period should begin.

### Social Media

- Update your social media profiles with current, trending hashtags, location information if it's changed, and any new keywords your firm may be using, e.g., you're now offering a new service or will be in 2018.
- Change company header and profile images to reflect something about your firm. The profile can still be your logo, but represented in a fresh way.
- Research hashtags associated with our service lines. Make a chart of them and focus on using them throughout the year. Remember to conduct social listening activities too so your brand name isn't associated with a negative hashtag or trend.
- Develop a social media theme for each month that focuses on driving leads toward your new landing pages.
- Add other social media posts that focus on company culture, corporate governance, and other important topics your clients need to know.
- Collect a list of quotes that reflect your firm's mission, such as "To keep a customer demands as much skill as to win one." – American Proverb. These posts can use a graphic and then posted on your social platforms. [Canva.com](https://www.canva.com) is a great resource for this.
- Write and schedule social media posts head of time, but monitor activity, engagement, comments, shares, etc.
- Obtain monthly social media analytics reports so you can track progress and adjust if something's not working.

Now that you have the checklist, it's time to get to work. Which are will you tackle first?

Download and/or share this checklist.



# 2018 MARKETING PREP CHECKLIST

Begin working on it now to meet  
the new year's demands.



## WEBSITE

Update the copyright and SEO keywords. Add new landing pages. Archive outdated content. Construct a monthly website analytics report.

## CONTENT

Develop new content, including videos, webinars, and podcasts. Create a content calendar. Collect filler content. Build a mobile-friendly enewsletter.



## PRINT MATERIALS

Determine if outdated materials should be revised and reprinted. Revisit past successful print campaigns for additional reach.

## EVENT PLANNING

Pinpoint events you plan to host, co-host, sponsor, or speak at. Now backup 10-12 weeks. That's when the promo period begins.



## SOCIAL MEDIA

Update profiles and header images. Develop a monthly theme. Store filler content like quotes. Write and schedule posts. Obtain monthly reports to monitor and track progress.

# Penheel Marketing

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