

In preparation for the fall and winter months, now is the time to begin winterizing your marketing plan. The suggestions below are provided to help you develop a marketing plan that will carry you through those months, while helping to increase leads and to generate brand awareness for your business.



If you own a smaller company or non-profit, tackling all of these marketing plan items at once may be a challenge. However, review the list below and choose the items that you feel will provide the most ROI. In the spring, begin to implement the other items for next year's growth plan.

- 1. Website Review.** So you have a website. When was the last time you updated anything on it?
  1. Take time to review and update [SEO keywords](#) and terms on the site.
  2. Swap out some photos to help keep the site fresh.
  3. Update outdated copy on the site and archive outdated content.
  4. Make sure your online portal, if applicable, is working correctly and that all your clients have access to it.
  5. Test out the Contact Us link so new leads are able to contact you.
- 2. Content Assessment.** Identify those inbound marketing elements, such as white papers, webinars, videos, checklists, tip sheets, and more that worked effectively earlier in the year.
  1. Find ways to re-purpose that content into additional inbound marketing opportunities. For example, turning a slide deck into an online video, or taking a series of similar-topic blog articles and turning them into downloadable whitepaper or eBook.
- 3. Develop Landing Pages.** If you haven't used landing pages for lead generation before, now is the right time to develop and implement them.
  1. Leverage tips sheets, slide decks, whitepapers, and other downloadable content that may be linked to a website form.
  2. The content is free to those who complete the form. What do you get? Additional leads and email subscribers for future marketing efforts.
- 4. Blog Articles.** Begin writing and squirreling away those blog articles for the winter

months. You may not have time write during busy season, but you can make time to post things. Find those relevant topics for your clients and begin writing them now.

1. Look at content you've been exposed to earlier in the year that you have earmarked for blog topics.
  2. Develop a blog calendar that aligns with your firm's goals and write about the topics that will help you to reach those goals.
  3. Increase exposure for your firm's staff - both partners and non-partners - to write content they can put their name on.
5. **Social Media Planning.** If you leverage social media in your firm, don't let it go dark during busy season. Leverage a scheduling tool, such as [HootSuite](#), to help you schedule social media posts over a period of months. That doesn't mean you should set it and forget though; remember to check the site a couple times per week to stay on top of responses and comments. Also, remember to share other people's content to help increase your social media reach.
6. **Online Advertising.** Now is the time to be thinking about increasing leads before busy season by developing online ad campaigns on search engines, online magazines, conferences, and/or social media.
1. Define the campaign goals, such as "Increasing LinkedIn referrals by 5% each month-over-month from January to March." Or, "Add five new leads from [enter source] each month from September through January."
  2. Conduct SEO keyword research based on website analytics and research tools like [Google's Keyword Ad Planning tool](#), to help you leverage the most effective terms for your campaign.
  3. Write the copy and develop the call to action for the ad. Create up to twelve ads with three ads per campaign to start. Manage the ads during the pre-busy season months, and schedule them not to run during busy season. Swap out poor-performing ads with new ads from the original twelve.
  4. Report on the metrics for successes and failures.
7. **Promotional Products.** The fall is a great time to thank clients for working with you. Consider sending your thank you prior to the holiday season or in January to help make it stand out.
8. **Referrals.** If the fall is a time when you're having more in-person or phone contact with clients, remind them that a referral is the best form of flattery. Give them an opportunity to share their thoughts about your firm with others by asking them to participate in a survey, sharing your firm's newsletter with their friends, and commenting on social media posts. In some cases, capturing people's survey comments on video is a nice way to increase the media mix on your website. Work

with a graphic designer to take text comments and to develop them into a video montage for use on the website, in newsletters, and client emails. Leverage tools like PowerPoint™ and [Google Hangouts](#)™ to complete the task. No fancy video equipment is needed.

9. **Emails.** If you need clients to take action on their account, connect with them prior to the holidays. View our blog on how to [leverage standardized emails to increase client engagement](#).

When it comes to marketing prior to busy season, what is your biggest challenge?

### Additional Resources

- [Conducting Keyword Research for Killer Online Ads](#)
- [Five-Step Process for Increasing Lead Generation with a Single Blog Post](#)
- [7 Summer Marketing Tips Make for Great Fall Leads](#)
- [8 Step Social Media Checklist for Business](#)
- [Landing Pages 101](#) (video)