Penheel Marketing

Virtual CMO for CPAs and Small Busines Owners

Winter is coming. Is your tax season marketing plan ready?
It won't be long before it's New Years, which is quickly followed by tax time. Is your marketing plan ready? What efforts will you put into play to draw in new clients, to increase revenue, and to grow your brand?

Below is a list of marketing tasks designed to help you address all of those questions as tax time approaches. Keep it handy by downloading the infographic.

October

- ☐ Identify the marketing budget for online ads and traditional marketing efforts for tax season promotions.
- ☐ Prep your social media (copy and images) for the months leading up to and during tax season, including Twitter, Facebook, LinkedIn, and other posts you plan to share from personal and company pages.
- ☐ Order client "thank you" promotional items for delivery in mid November to mid December.
- ☐ Define your marketing goals for online advertisements that should run beginning in December and end in late February.
- ☐ Research hashtags and keywords to ensure you're attracting the right clients to your brand.
- ☐ Share the plan with staff with guidelines on how they can help promote the firm and its services.

November

- ☐ Order the promotional "thank you" item for clients.
- ☐ Prepare thank you note and/or print materials to accompany the gift.
- ☐ Begin gathering reminders for email distribution in late November, such as last-minute tax deductions, tips on contributions to 401(k) and IRAs, and tax return preparation tips.
- ☐ Write blog posts and/or create downloadable content for distribution from January thru April, such as year-end tax planning tip sheets, how to's, record retention guidelines, and Q&As.
- ☐ Publish blog posts, but use publish dates into the new year so it appears that content is fresh and being generated during tax time.
- ☐ Record any webinar, podcast, and/or video content to use during and post busy season.
- ☐ Create and/or update the crisis communication plan.
- ☐ Distribute client thank you gift.

December

- ☐ Post blog content for January – April
- ☐ Create landing page forms for downloadable content, post content, and test forms.
- ☐ Ensure website analytics are tracking all downloads and click thru traffic.
- ☐ Distribute client emails with reminders, how to's and year-end tax tips.
- ☐ Review portal instructions and prepare client email with instructions and images for January distribution.
- ☐ Create landing pages for online ads.
- ☐ Write online ads for placement in search, on specific websites, and social media, accompany the ads with graphics developed specifically for online ad use.
- ☐ Refresh social media posts with new content and images; then schedule them through the end of April.
- ☐ Begin placing online and social media ads to help increase branding and to land new clients.

January

- ☐ Distribute social media posts to staff for use during busy season; ask them to schedule them on their personal profiles. Tip: Hootsuite, Buffer, SocialOomph, SproutSocial, and TweetDeck offer this for free.
- ☐ Monitor social media and online ads and adjust as needed.

- ☐ Distribute emails to clients about portal instructions, W2 and 1099 filing deadline changes, and tax tips. Also, remind them to follow you on social media for updates throughout tax season.
- ☐ Share fun photos on social media of how the staff is preparing for tax season.
- ☐ Share portal instructional videos and process guidelines.

February - April

- ☐ Continue to share social media posts, adding new ones into the mix.
- ☐ Monitor social media and online ads and adjust as needed.
- ☐ Ensure blog posts and downloadable content is publishing correctly on the website.
- ☐ Distribute client email with updates they need during and post tax season.
- ☐ Respond to any leads (comments/shares) generated through the website, email, or social media.
- ☐ Post photos of the team as they continue to provide amazing service during tax season.

Sample Blog Topics

- 5 Money Resolutions to Make in 2017
- Tax Planning Tips for Newlyweds / Divorcees / Retirees
- Tax Planning Tips for Parents with College-Bound Kids
- Tax Deadlines for the Single / Married Filer
- Tax Deadline for Small Business Owner
- Need a Tax Extension? What You Need to Know.
- 3 Ways to Grow Your Business in 2017
- 5 Ways to Avoid a Tax Audit
- 7 of the Most Outrageous Tax Deductions We've Ever Seen
- Top 10 Tax Season Pet Peeves
- Is it tax deductible? Try the quiz!

Sample Social Media Posts

To help you plan, here are some social media posts to go with the above blog topics.

Twitter: 5 money #resolutions to make in 2017. How many will you accomplish? [link to blog] #FinancialPlanning
Facebook/LinkedIn: 5 Money Resolutions for 2017. While you're writing your 2017, remember to include some money-saving resolutions. Here are some we love. [link to blog] #FinancialPlanning #Resolutions

Twitter: Need a #taxextension? Don't make a move without reading this first. [link to blog] #taxtips
Facebook/LinkedIn: Do you need a tax extension? It's not as easy as it may seem. Don't make a move without reading this first. Contact us if you have questions. [link to blog] #TaxExtension #TaxTips

Twitter: Did you get married in 2016? Here's how it impacts your #TaxReturn. Get the tips >> [link to blog] #TaxTips
Facebook/LinkedIn: Did you get married in 2016? If yes, there's going to be an impact on your tax return. Get the tips you need before you file your return. [link to blog] #TaxTips #TaxReturn

Winter is coming. How will your marketing plan weather the storm?