

18 Busy-Season Marketing Tips for Firm Success

Now's the time to think about year-end and busy-season marketing efforts, whether it's for individual returns or business year-end taxes. Use this checklist to prepare your website, to develop marketing campaigns, and to create content for social media sharing before year's end.

If you fall behind now, you may not recover until May.

Website Tips

Your website should be in tip-top shape before busy season gets underway. Here are some tips to help you get ready.

- Update the firm's SEO keywords with new, relevant terms that have cropped up during the year, e.g., industry, tax-related, service line, etc.
- Check your website analytics keyword report for the most common search terms used throughout the year. If you have more than one location, by location as well. Then add them to relevant pages throughout the site.
- If using Google Analytics as your reporting tool, set up your Search Console tools. That allows you to view the "not provided" search terms people use most often to find your firm. Add relevant terms to your website.
- Refresh your local search business listing (e.g., Bing Places for Business and Google My Business) with busy-season hours, parking information, services, keywords, and photos.
- Add an Appointment plugin, such as StartBooking, BirchPress, Booking Calendar, WP Simple Booking Calendar, or Easy Appointment, to your WordPress site to encourage visitors to schedule an appointment.
- Ensure contact forms are working properly and the emails are being delivered to the correct resource.
- Revise relevant blog content, fact sheets, tip sheets, Q&As, and more with 2018 publishing dates.
- Add and test a portal link to the site for client uploads.
- Consider adding a chatbot for pre-busy and year-end questions that can be answered by staff prior to busy season. Turn it off during busy season if you don't have the staff to oversee it during that time.
- Create new landing pages and forms for industry-specific or service-level specific, high-priority billings for pre-busy season promotion.
- Post a how-to video or tip sheet that helps clients organize files before submitting them to their you. TurboTax has several samples here <https://turbotax.intuit.com/tax-tips/tax-planning-and-checklists/>.

Marketing Tips

Here are some marketing campaigns you can develop now, schedule for release in early December and run through busy season if desired.

- Search Ads are a great way to keep your brand top of mind for those looking for individual services. For a limited budget, you could run a simple text ad, such as these, "You earned it. We'll help you keep it. Accurate tax filings. Maximized Deductions. Fast Returns. Call [phone number and brand]." Or, "Your tax return is unique. Don't settle for cookie-cutter services. Call today[phone number and brand]."
- Prepare client email reminders with year-end resources. Consider a referral discount for new business. Send reminders at least once per month from now until January 15.
- Consider the monthly themes for online content that should be written now and scheduled to publish during busy season, for example – January's Start Fresh campaign with budgeting tips; February's Love Your Tax Return campaign with tips on how clients' can prepare their tax files to maximize returns; March's Don't Wait for Luck campaign focusing on last minute tax preparation and/or gambling winning's tax implications; and finally April's Don't Be A Tax Fool campaign about why tax filing deadlines are in place and why it's foolish to miss the deadline and opt for an extension.
- Social Media ad campaigns are also effective for firm's looking to reach their target demographic. From photo/text ads to graphical and video ads, you can make a big impact with just a few dollars a day when using a conversion ad campaign.

Social Media Tips

The AICPA has several social media resources you can use to create content that can be schedule now for release throughout busy season, including:

- [Tweets](#)
- [Mini tax articles](#), and the
- [Affordable Care Act FAQ](#) (login required)