



Summer Campaign Planning Worksheet for CPAs

Creative tactics to build momentum before fall hits.

Summer doesn't have to be a waiting game. While other firms hit pause, smart accounting firms are using this time to build brand awareness and attract the kind of clients they want in Q3 and Q4.

The key?

Launching seasonal campaigns that speak directly to your ideal audience—with offers, education, and relevance that create action now.

5 Campaigns

- ✔ Set-It-and-Forget-It Automation Setup Package
- ✔ Optimize-Before-October Tax Position Review
- ✔ Niche-by-Need Targeted Industry Series
- ✔ Refer-and-Relax Incentive Campaign
- ✔ Summer Smarts Mini Webinar Series

CAMPAIGN DETAILS

1. "SET IT AND FORGET IT" AUTOMATION SETUP PACKAGE

Target audience: Small business owners juggling day-to-day operations.

Summer is when many business owners want less to worry about. Offer a limited-time "Set It and Forget It" bookkeeping or automation package:

- QuickBooks rules + recurring entry setup.
- Automated invoice reminders and payment alerts.
- Email notification settings for late payments or bank syncs.

Campaign Tip: Use social proof like "5 hours saved per month" or "Clients report fewer errors within the first 30 days."

Promotion ideas: Instagram before/after videos, email list, and short testimonial quotes.

2. “OPTIMIZE BEFORE OCTOBER” TAX POSITION REVIEW

Target audience: High-earning individuals or business owners with estimated taxes due.

Summer is the ideal time to assess:

- Whether estimated payments are accurate.
- If retirement contributions are optimized.
- How current spending is affecting year-end liability.

Position this campaign as a proactive money-saving checkup—not tax prep.

Bonus: Offer it as a “partner package” for spouses or co-owners to boost word of mouth.

Promotion ideas: Use a short video on LinkedIn titled “3 Tax Moves to Make Before October 1.”

3. “NICHE BY NEED” TARGETED INDUSTRY SERIES

Target audience: Industry-specific prospects (e.g., dental practices, real estate agents, solo law firms).

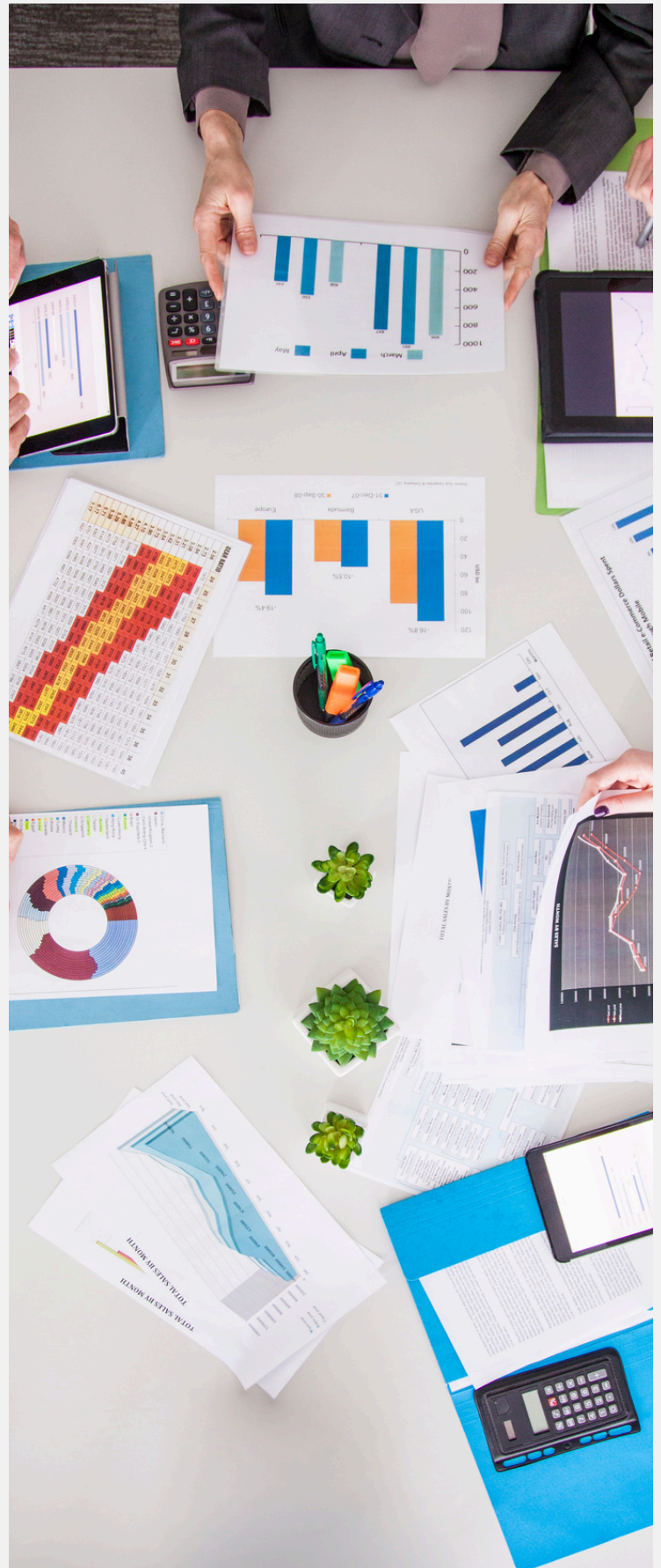
Instead of broad messaging, run a one-week mini campaign tailored to a specific vertical.

Example:

- For dentists: “5 Financial KPIs Every Practice Should Track This Summer”
- For real estate: “Are You Maximizing Your Commission Deductions?”

Campaign Tip: Include an industry-specific landing page, short blog post, and one quick tip email.

Promotion ideas: Use email segmentation, industry Facebook groups, and niche hashtags.





4. “REFER AND RELAX” INCENTIVE CAMPAIGN

Target audience: Existing clients who love you but need a reason to share your information.

Design a summer-themed referral campaign with simple rewards.

Examples:

- \$50 Amazon card for every referral that books a consult.
- Entry into a drawing for an end-of-summer service or swag bag bundle.
- Donation to a local nonprofit in the referrer’s name.

Make the program visible on your website, email signature, and invoicing platform.

Promotion ideas: Include a pre-written “forward to a friend” message and custom landing page with FAQs.

5. “SUMMER SMARTS” MINI WEBINAR SERIES

Target audience: Time-strapped business owners looking for guidance, not fluff.

Host a 3-part, 15-minute webinar series with snack-sized insights:

- “Top 3 Financial Mistakes to Avoid This Summer”
- “How to Clean Up Your Chart of Accounts Before Fall”
- “Summer Payroll Updates: What’s Changed?”

Record and reuse as on-demand lead magnets or email series follow-ups.

Promotion ideas: Promote one clip per week on LinkedIn with captions + a clear CTA to book a consult.

QUIET MONTH PRODUCTIVITY

The “quiet” months are only quiet for firms that let them be. By launching targeted summer campaigns now, you can build visibility, gain trust, and start Q3 with real momentum.