

Hot Leads, Cool Campaigns Summer Checklist for CPAs

6 campaign ideas with planning timelines and promotion suggestions.



Back-Burner Project Campaign

Timeline: Launch mid-July and run through August

Promotion: Promote through client email, Instagram Stories, and client portal reminders



Tax-Free Weekend Service Package

Timeline: Run during your state's tax-free weekend (varies)

Promotion: Feature on website banner, email, and paid social ads



Read This, Not That: Financial Summer Reading List

Timeline: Publish by early July

Promotion: Share on LinkedIn, blog, and in client newsletter



Local Business Spotlight Series

Timeline: Highlight 1 business per week for 4 weeks

Promotion: Tag partners on social, share interviews or quick Q&As



Picnic with a Pro Event

Timeline: Plan 3 weeks in advance; host in July or August

Promotion: Invite via email, promote on social, and cross-post to local business groups



Summer Startup Kit for New Clients

Timeline: Offer from mid-June through August

Promotion: Create a landing page, share in startup communities, use LinkedIn messaging

The leads are out there—you just need to give them a reason to engage.