

Selling and Marketing During Busy Season

Sara Robertson, Marketing Manager, GBQ Partners LLC

Whether you're new to the profession or have been an accounting marketer for years, it's no secret that "busy season" is one of the most opportune times of the year to find new clients; however, getting your accountants to capitalize on the opportunity can be challenging. It's no surprise that the subject of selling and marketing during busy season has been a popular topic on the AAM listserv (<http://talk.netatlantic.com/read/login/>) (AAM Members only), LinkedIn (http://www.linkedin.com/groups?mostPopular=&gid=103368&trk=myg_ugrp_ovr) group and most recently, the topic of discussion for the January 27 AAM Roundtable call, facilitated by Sarah Johnson (<http://www.linkedin.com/in/sjjohnson>) of the Koltin Consulting Group.

The following are some of the ideas gathered from the above sources to help you turn "busy season" into "business development season."

For marketers:

- *Public Relations.* Assemble a "Tax Season Media Guide" for distribution to reporters, editors at your local business journal, newspapers, radio stations, etc. Follow up and let them know why it is important to their readers, listeners and viewers.
- *Plan ahead.* Set goals so the accountants know their marketing responsibilities and are aware of the expectations and commitments in advance of busy season.
 - Schedule a standing meeting with key people – block off time in advance. On the contrary, be flexible to meet afterhours. Don't be afraid to get face time on Saturdays – this tends to be a better time to meet and there are often times fewer distractions.
- *Focus on your 'To Do List'.* Focus your time on activities that don't require direct or a significant input from the professional staff including: write case studies; develop website and marketing collateral content; work on CRM/database management; begin the preliminary work on upcoming campaigns; market research; set-up or tweak your client satisfaction survey; and develop internal tools and resources.
- *Referral Sources.* Help your accountants stay in front of their referral sources.
 - Run a targeted campaign with information tailored to specific types of referrals (i.e. bankers, attorneys). Send communication to these individuals once a month to help your firm stay top of mind.
 - Encourage referral sources that want to stay in front of your associates to come into the office at the end of the day and bring a snack (or dinner!). This is a great way to communicate their message to associates – your accountants will welcome the break since they're working late.

For accountants:

- *Value Add.* Turn a one-time client into a repeat client. Get contacts signed up for applicable firm newsletter(s), blog RSS feed, seminars, etc. Provide contacts you're working with information that will help them beyond tax season.
- *Ask for the referral.* Once you have helped save your client money or they have complimented you on what a great job you do, let them know you enjoy doing their work. Clients are your best sales people - they already believe in your firm.
- *Don't forget referral sources.* Call one of your top referral sources to see if they have any new leads. Set up a lunch for late April. They will be impressed you took time to call them during busy season. Remember, you are helping them as much as they are helping you.
- *Client Servicer.* Nurture your client relationships and let them know how important they are to you. Don't just assume they know this - *tell* them. When appropriate, ask them if there are things you

could be doing better. Customer service and strong relationships with your clients are crucial to the future of your firm.

See, busy season doesn't mean you get to stop marketing. It is so important (and easy!) to stay in front of clients and prospects during these next few months. With just a little time each week, it is possible to turn busy season into marketing season!