Kristy Short • Feb. 25, 2014

Communicating with clients year-round is a necessity in order to keep your firm top-of-mind, cement your position as trusted advisor, and ensure that clients are consistently updated on timely matters. While this is a good rule to follow, most firms find it difficult, if not impossible, to maintain client communications through tax season. This is not an impossible task, especially if you follow a set-it-and-forget-it method and other smart tactics that will enable you to maintain a consistent communications program without a big time investment.

Here are a few easy tips to ensure your marketing efforts don't go cold during tax season:

1. **Schedule Communications for Auto Launch**—With today's advanced email marketing solutions, you can easily schedule all your client communications ahead of time...and then *fa-getta-bout-it* as you move into busy season. Even better, tax season is the easiest time of year to determine needed communications. For example, schedule a Q1 marketing "package" and begin launching communications this month. Consider these ideas:
    - **Client Newsletter**—Send a concise client newsletter with helpful tax season tips and tactics. You can write this piece yourself, or quickly sign up for one of the many newsletter services designed for the accounting profession.
    - **Client Tax Organizer Email Reminder**—By February, you've most certainly communicated with clients about the availability of their current-year tax organizer. As such, February is a good time to send a reminder to ensure clients complete their organizer.
    - **Portals Email**—Send an email or postcard (if you want to balance your Q1 communications program with print materials) that encourages your clients to use their client portal. Make sure to express the convenience of using

portals to upload source documents and exchange files during tax season.

Advertisements—If you want to continue prospect marketing during tax season as well as communicating with clients, plan to run an ad over the Q1 time period. This will keep your brand top-of-mind in the community while you are heads down with returns.

2. **Focus on Client Marketing Only**—Save your aggressive prospect campaigns for after April 15th…when you have time to handle them. Remember, it’s far more lucrative to maintain the clients you have than to bring in new leads; so make sure you continue to “touch” your existing clients with helpful communications.
3. **Post Regularly to Your Blog**—During tax season, you can get away with posting just once a month…just make sure that each post is educational and contains helpful, tax-season-related information for your readership. For those who don’t have time to write blog posts, outsource this task to a contractor. There are plenty of them out there. These folks can also take on the task of posting blogs to your website for you.
4. **Stock Up on Printed Collateral**—Don’t miss a single opportunity to sell added services to clients during tax season. This is the one time of year that you know most clients will be in front of you. These face-to-face meetings present a grand opportunity to present new services and up-sell. That said, be sure to have current marketing material on hand to go over with your clients. Also make sure to send marketing material home with clients to review later. Again, if you don’t have time to create new marketing collateral, outsource this to a contractor.

These are just a few sound tips to keep your marketing program rolling even during busy season. Marketing is all about frequency and consistency; that is, staying on the minds of your clients and the community as a whole. Tax season can certainly put many non-tax related tasks on the back burner, but just remember—if you are not staying in touch with your clients, someone else may be. Take a few minutes to implement a few of these ideas and keep your marketing engine revving.

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