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with you this year? If not, here are 11 memorable ways to connect with them throughout the season. Pick one or two. Add them to your action list. Then get ready for ...

Becky Livingston • Nov. 03, 2020



As the holiday season approaches, do you have a plan to thank clients for working with you this year? If not, here are 11 memorable ways to connect with them throughout the season. Pick one or two. Add them to your action list. Then get ready for some end-of-the-year holiday cheer.

Charitable Contribution

Benefiting your community by offering a charitable contribution is a win-win for

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Consider reaching out to clients asking them to participate in your food/coat/toy drive to help benefit those in your community. Before creating this event, contact local charities to understand what their donation policy is during the pandemic. Kick it off with a contribution from your team. Then reach out to clients, vendors, partners, and family members to make the drive a success.

Holiday Survival Kit

This can be sent via mail or electronically. Create a unique combination of items that will help your clients plan for year-end, including tax tips, holiday budgeting, estate planning reminders, next year's calendar, and more. Add a gift tag with the staff's photo or a short video if done electronically. Check out Pinterest for creative and crafty holiday ideas. This is a fun way to get staff and kids involved too.

Social Media

Throughout the season, post-holiday-themed social media content. Consider highlighting service-related quotes clients have shared with you during the year. Put them in a creative image format or video (Canva.com is great for this!). Include a story about the business that has a powerful message. Also, think about sprinkling in some recipes for business success, such as Holiday Recipes for Business Success – Let us help you whip up some plans for your business, or 20-Minute Business Tips You'll Be Glad You Tried.

Spread Cheer

You still have time to send a holiday greeting card. But, take the glossy card one step further by including an extra note for the client, like three tips they should consider in Q1 of the new year. On the note, include the firm's phone number and how you can help them with those tips. Keep it short and print it on colored paper to help it stand out.

8- or 12-Day Giveaway

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clients to send in their best recipes to create a recipe book for sale in the spring. Then donate the book sale proceeds to a food pantry in your area.

User-Generated Content

On the firm's social media accounts, ask staff and clients to share their favorite holiday memory. Including photos and / or video to help make the posts memorable. Use a firm-specific hashtag, such as #[firmname]Holiday or #[firm]HolidayMemories to help track engagement.

Wow, That's Ugly

This is a great virtual event. Host an ugly, holiday sweater photo contest in conjunction with some local businesses. Photos would be uploaded to social media and the whole family can play along. Prizes would be from local businesses. The promotion would happen on the collective business' social media profiles. It's a win-win for all companies involved and helps to cross populate contacts.

Communicate

Set aside time to make personal phone calls to check in with clients. Get a bead on how things are going and whether or not there's something you can help them with. It's also a great way to schedule January and February appointments prior to tax season.

The Gift That Keeps On Giving

Create an email campaign that spans the month and shares business tips with clients that they can use all year long, such as best [industry] podcasts, top [industry] business books, QuickBooks tips for the layman, and more. Then, put those tips in your website and post social media content pointing back to that page throughout the year.

Now's the time to plan and execute your holiday efforts. What will your firm be

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