

# Tips from the Home Front—Marketing During Tax Season

BY JEAN MARIE CARAGHER

It is challenging, yet important, for CPAs to continue their marketing and sales efforts during tax season. Tax season is the time when you are in close contact with all of your clients. Take advantage of this opportunity and continue to add to the bottomline of your firm during your busiest time of the year.

I checked with several marketing directors throughout the country to find out firsthand what they have done to generate leads and keep marketing alive during tax season. As much as many of you want to think that life comes to a halt during tax season, this is not the case. Here are some of the activities various firms are undertaking.

## Home Forms Accountability Groups

A core group of shareholders at Horne CPA Group based in Jackson, MS (8 offices, 21 Partners, 120 professionals) meet for 90 minutes once a month to discuss their prospect list and top clients. Other key people were identified to join this core group to form an Accountability Marketing Group in the firm's Jackson headquarters in September 2001.

The Accountability Marketing Group focuses on a specific list of clients and prospects during busy season. Specific issues will be identified to discuss with each client and prospect. Role-playing and learning how to overcome objections is part of the meeting.

"All shareholders have sales goals," explains Shawn McGregor, business development manager. "This group is interested in exceeding them. The reward is selling more and increasing their share of the pie."

Currently, four of Horne CPA Group's offices have Marketing Accountability Groups.

## Cross-Selling Works at Wolf

While marketing director at Wolf & Company in Oakbrook, IL, Marlin

Bochantin organized a cross-selling program for tax season. The goal was to set up appointments for new services during tax season and to close the sale in May and June.

In 1997, the first year of the cross-selling program, a list of 31 potential services was developed and distributed to partners and staff. However, the focus was not on making appointments and the program was not successful. In 1998, the firm focused on specific service lines including investment advisory services and financial planning.

In 1999, the firm's cross-selling program generated a 12 percent increase in revenue from existing clients by selling additional services and a 17 percent increase in profits. The lesson here is to keep working at your program, even if it is not successful the first year.

## Virchow Krause Works With Media

Several years ago, Virchow, Krause & Company, based in Madison, WI (15 offices, 63 partners, 579 professionals) conducted a "14 Days to April 15" public relations campaign. A news release was sent to print and electronic media each of these 14 days including tax tips, tax deadlines, and other information. The campaign resulted in quotes in the *Wisconsin State Journal* and *Capital Times* and coverage on the local NBC affiliate.

## Brady Ware's Parties Set Them Apart

One way in which Brady, Ware & Schoenfeld, Inc. in Dayton, OH (2 offices, 14 partners, 90 professionals) sets their firm apart is to hold open houses during tax season for clients, prospects, and referral sources. The firm's open house in February 1998 attracted about 175 people and leveraged the theme of the Association for Accounting Marketing conference, "The Future's So Bright You Gotta Wear Shades."

Open house attendees were given sunglasses with the firm's logo. Their pictures were taken with a Polaroid camera and posted on a wall in the main event area. After the event Brady Ware partners and staff sent attendees their photo along with a handwritten note.

Brady Ware's February 2000 open house followed the theme, "We're a Blended Organization." Invitations included a silver blender on the cover and the event's menu on the inside. Blended drinks included a CPA Slinger, a Life and Health Insurance Colada, and an Entrepreneur Boost Juice. To enable the partners to meet with all the attendees they wore aprons and assisted the bartenders in mixing drinks.

The menu also included Buenos Business Valuation Bowl, Veggie Pension Platter, Twist on Personal Investments, Employee Benefit Blitz, and Technology Consulting Tiramisu. Brady Ware team members wore Hawaiian shirts and Jimmy Buffet music played in the background.

"We had just announced our strategic partnership with Brady Meixner, an employee benefits company," explains Linda Watson, marketing director. "This open house had several goals including creating awareness of Brady Meixner, inviting Brady Meixner clients to our office, introducing Brady Meixner clients to the Brady, Ware & Schoenfeld team, and cross-selling Brady, Ware & Schoenfeld services to Brady Meixner clients."

This event attracted 215 people. Brady, Ware & Schoenfeld has become known as a different type of CPA firm and clients and referral sources look forward to the event. "Our open house attendees often comment, 'I can't believe a CPA firm is having an event during tax season,'" says Watson. "Marketing doesn't stop during tax season. These events open the door of