

Practical Accountant

PROVIDING THE COMPETITIVE EDGE

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Tips for Tax Season

You don't have to give up marketing during the coming busy season, according to Jean Marie Caragher, president of Capstone Marketing. She offers these tips for keeping your toe in the water while your nose is to the grindstone.



1. *Maximize the effectiveness of your receptionist and reception area.* Notify the receptionist about which clients you expect in your office each day so they can be greeted personally, and keep the receptionist informed of your whereabouts. Also educate the receptionist about the services your firm provides and a key contact for each service. Display your firm brochures and newsletters in the reception area, and put together a binder of articles that your firm's professionals have written or been quoted in.
2. *Continue to hold regular marketing meetings.* Leads will grow cold if you wait two or three months to follow up, and the internal momentum of your marketing program will wane and will take lots of energy to rekindle in May and June.
3. *Organize mixers with referral sources.* This will enable your partners and staff to use their marketing time efficiently. Mixers can be held in your office or at a club or hotel, and can be arranged by your firm's marketing director or administrator. Plus, your firm will reap extra benefits if your competition is hunkering down in their offices, ignoring their own marketing efforts.
4. *Identify cross-selling opportunities.* Hold client service meetings for key clients with your partners and staff. Identify those additional services that would be most valuable for these clients, and plan how you will pitch these services. Write a description of the benefits the clients will receive and practice your presentation. Perhaps your goal for tax season should be to arrange appointments with your clients for after tax season, when you will close the sale.
5. *Educate staff on services provided by the firm.* Conduct briefings where your service specialists describe the service, the targeted client base, and how to recognize opportunities. Also provide your staff with guidance on what they should do when they identify a cross-selling opportunity.
6. *Be a resource for financial media.* Tax season is prime time for articles and programs on financial and tax issues. Be sure to include media contacts on your newsletter mailing list. Prepare a media kit, including contact information and areas of expertise for your media-savvy partners and managers, and send it to local reporters. Invite reporters to breakfast or lunch to start building a relationship. Bring story ideas with you.
7. *Include tax tips on your Web site and e-mail signature.* Position your Web site as a resource for clients, prospects and media.
8. *Collect e-mail addresses for all clients.* Ask your clients, prospects, and referral sources the types of information they would like to receive and the frequency of your messages. Your e-mail messages may provide links to your Web site or to other resources they would find beneficial. Also, consider using e-mail for seminar invitations and client surveys.
9. *Attend half of your regular trade and civic meetings.* You want to be visible and stay in front of clients, prospects, and referral sources.
10. *Collect client testimonials.* When you receive compliments from your clients ask them to put it in writing. Collect testimonial letters in a binder and use it on sales calls and display it in your reception area.