

## Five End-of-Year Marketing Tips

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With fewer than two months left in 2009, time is running out to execute your last minute marketing campaigns. Marketing in November and December is a different beast than during the rest of the year. If you are like many advisory firms, you might find it difficult to set appointments with prospective clients during this time.

This slow period, however, doesn't mean you should halt your marketing efforts. You need to adjust your strategies and take advantage of the unique opportunities that are available during this period. Here are five tips to help make the most out of your end-of-year marketing.

### Write your 2010 marketing plan

Now is the time to write your 2010 marketing plan so that you can come out of the gate running in January. Document your objectives and strategies for next year and write down how you plan to accomplish them. Pull out a calendar and schedule the specific dates when you wish to accomplish each activity. This will provide you with set deadlines to ensure that you are systematically and consistently marketing. Marketing plans take time to create and executing campaigns takes even longer. If you wait until January to write your plan, you'll be playing catch up. Worse, you may miss out on great marketing opportunities in January, which is traditionally a receptive time for prospective clients.

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## **Meet with CPAs**

From now until the end of the year is a slow period for CPAs. Take this time to nurture your relationships with these professionals for the purpose of generating referrals in 2010. If you host continuing education courses (CPE) for CPAs, schedule them between now and mid-December. If seminars are not your style, schedule coffee, breakfast or lunch meetings. Once February hits, these professionals will be out of reach, so nurture your relationships now to plant seeds for referrals in 2010.

## **Reach out to clients**

Your clients are the lifeblood of your business. Show them you appreciate their business by doing something nice for them. Whether you send Thanksgiving cards, holiday cards, gifts or flower arrangements, your clients will appreciate the sentiment. Consider hosting a fun holiday appreciation event like a Holiday Lights Limo or Bus Tour where you are chauffeured around town admiring light displays and drinking seasonal libations. Encourage your clients to bring friends and your field trip may turn into referral business.

## **Network**

Networking is an important part of any marketing strategy because it helps you expand your social and professional circles. The more people you meet, the more opportunities for business. This time of year provides a variety of unique networking opportunities. Associations, charities, and businesses commonly host holiday parties and fundraising events. Take advantage of these opportunities to meet new people by attending as many events as you can manage for the remainder of the year. More importantly, find a way to connect with people after the event, whether that is by phone, email, LinkedIn, Facebook or Twitter. While the introduction to a new contact is important, maintaining the relationship will be even more critical to success.

## **Develop a client survey**

Client surveys are valuable tools to analyze satisfaction levels, evaluate service offerings and identify potential referral sources. It makes sense to survey clients at the end of the year or at the beginning of the coming year. Either way, now is the time to develop your survey. You can easily create your own email survey with a tool like [SurveyMonkey.com](http://SurveyMonkey.com) or you can hire a firm like [Advisor Impact](#) to help you. You will want to encourage participation by offering to donate money to a charity for each survey returned or by conducting a drawing for a prize among those clients who complete the survey. Just remember to distribute your survey in the first week of December or after the first week in January to garner the most response.



Make the most of these last two months of the year by planning for 2010 and finding fun and creative ways to market to your clients, network within the community and nurture existing relationships. Doing so will set the stage for a prosperous new year.

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