

Five End-of-Year Marketing Tips

November 17, 2009

by Kristen Luke

Advisor Perspectives welcomes guest contributions. The views presented here do not necessarily represent those of Advisor Perspectives



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.

Other Articles by Kristen Luke

- Convert Prospects to Clients through Drip Marketing
- Five Marketing Lessons from Schwab IMPACT
- Five Ways to Cultivate Professional Referral Relationships
- How to Setup a Facebook Business Page
- Make the Most of your Networking after the Event
- Marketing with LinkedIn: Create Your Own Group
- Should You Write Your Own Blog?
- Social Media Marketing for the Everyday Advisor
- Social Networking is Still Networking
- The \$3,000 Marketing Plan
- Three Ways to Market Your Business Using Facebook
- Touch Your Clients 24 Times a Year without Breaking a Sweat
- Twitter Your Way to New Clients, Part One
- Twitter Your Way to New Clients, Part Two
- Which Social Media Tool is Right for You?

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.

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.