

# Summer Marketing Checklist for Accounting Firms

## What Every Accounting Firm Should Be Doing Now

### AUDIT YOUR ONLINE PRESENCE

Take 30 minutes to review the website pages your prospects and clients see daily.

- Confirm copy, service pages, bios, and contact forms are current
- Test your site's mobile responsiveness and loading speed
- Update social media bios with the correct links, hashtags, and descriptions
- Verify business listings on Google, Bing, Yelp, and industry directories

**Why it matters:** A clean, accurate online presence builds trust before a single conversation starts.

### UPDATE OR BUILD LEAD NURTURE SEQUENCES

Ensure that every lead hears from you with relevant, helpful content—automatically.

- Review and refresh your welcome email or drip campaign
- Segment your contacts (by industry, service interest, etc.)
- Add a clear call-to-action in each message
- Consider creating industry-specific nurture paths for top client types

**Why it matters:** Consistent, personalized follow-up increases conversions and keeps leads warm longer.

### REVISIT YOUR MARKETING GOALS

Mid-year is the perfect time to see what's working—and what's not.

- Compare your current performance to your original marketing KPIs
- Identify your top-performing channels (email, ads, social, SEO, etc.)
- Assess your lead-to-client conversion rate
- Refocus goals based on upcoming seasonal services or capacity

**Why it matters:** Aligning your marketing strategy with real performance data keeps your efforts efficient and effective.

### PLAN YOUR FALL CAMPAIGN

Avoid the September scramble by mapping out campaigns now.

- Identify key seasonal services (e.g., year-end tax planning, budgeting, etc.)
- Create a basic content calendar with blog topics, emails, and social posts
- Set internal deadlines for each deliverable
- Prep visuals or downloadable resources for campaign support

**Why it matters:** Getting ahead on fall ensures your brand shows up with confidence when clients are ready to act.

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### BUILD OR REFRESH INDUSTRY-SPECIFIC LANDING PAGES

Speak directly to your best-fit clients with content that resonates.

- Create pages focused on specific industries or services you specialize in
- Use client pain points, real results, and strong CTAs
- Add testimonials or case studies relevant to that niche
- Include a lead magnet, like a checklist or guide, for email capture

**Why it matters:** Tailored landing pages boost both SEO and lead conversion rates.

### CREATE ONE EVERGREEN CONTENT PIECE

Put your expertise to work with a deep-dive content asset that works year-round.

- Choose a topic that addresses a recurring client challenge
- Format it as a long-form blog post, downloadable guide, webinar, or video
- Optimize with keywords and promote across all channels
- Use it as the centerpiece of a future lead generation campaign

**Why it matters:** Evergreen content builds authority, drives traffic, and supports multiple campaigns.

