2027 Accounting Firm Marketing Checklist

7 Areas to Review. 3 Priorities to Improve.

Your accounting firm doesn't need to do *everything* differently in 2027. But it does need to know which marketing efforts are helping attract the right clients.

How to use this checklist:

Check each statement that is true for your firm today. Leave anything you're unsure about unchecked. When you're finished, choose three areas to improve over the next 90 days.

Know Who You Want to Attract

Your goal: Focus your marketing on the types of clients and services that will help your firm grow.

□ We can name two or three types of clients we'd like to attract, such as business owners, law firms, or nonprofit organizations.
□ We know which services we want to grow in 2027, such as tax planning, advisory, or outsourced accounting.
□ We understand the problems these clients face and the questions they ask before hiring a CPA.
□ Our website and marketing messages speak to these clients rather than trying to appeal to everyone.

Give Your Website a Fresh Look

Your goal: Help prospective clients quickly understand what your firm does and how to contact you.

□ Our homepage clearly explains who we help, what services we offer, and why someone should choose us.
□ Our service pages reflect what we offer today, not what we offered five years ago.
□ Our website is easy to read and navigate on a smartphone.
□ Visitors can easily find our phone number, contact form, or consultation request page.
□ We have reviewed our website in the past 12 months to check for outdated information, broken links, and staff changes.

Help People Find Your Firm Online

Your goal: Make it easier for prospective clients to find your firm through Search and AI tools.

□ Our website clearly describes our services, areas of expertise, and the clients we serve.
□ Our Google Business Profile has accurate contact details, services, and office information.
□ We have helpful website content that answers questions prospective clients might search for online.
□ Our articles and service pages explain topics clearly, with examples and useful advice rather than general statements.
□ We have tested a few questions in Google and AI search tools to see whether our firm appears and whether the information is accurate.

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Make Your Emails Worth Opening

Your goal: Stay connected with clients and prospects by sharing information they can use.

□ We send helpful emails on a regular schedule, even if it's only once a month.
□ Our email subjects explain why the information matters to the reader.
□ We share practical tips, deadline reminders, or answers to common client questions rather than only promoting services.
□ Each email has one clear next step, such as reading an article, downloading a guide, or contacting our firm.
□ We review email results to learn which topics encourage readers to click or respond.

Make Social Media Manageable

Your goal: Build trust and stay visible without spending hours creating posts.

□ We have chosen one or two social media platforms where our ideal clients are likely to spend time.
□ We have a posting schedule our team can maintain, even during tax season.
□ Our posts share useful advice, answer questions, or offer a point of view rather than only promoting the firm.
□ We occasionally feature our people, community involvement, or firm experiences to help readers get to know us.
□ We pay attention to comments, questions, and conversations, not just likes and follower counts.

Get More Value From the Content You Create

Your goal: Save time by turning one useful idea into several marketing messages.

□ We keep a list of questions clients ask during meetings, calls, and emails.
□ We use those questions to create helpful articles, emails, social posts, or short videos.
□ We share useful content in more than one place, such as turning a blog article into an email and two LinkedIn posts.
□ We review older articles and update them when tax rules, deadlines, or client needs change.
□ We offer at least one helpful resource, such as a checklist or guide, that gives prospective clients a reason to connect with our firm.

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Know What's Working

Your goal: Spend more time on marketing that helps bring in the right clients.

□ We ask new prospects how they heard about our firm.
□ We track how many qualified inquiries or consultation requests we receive.
□ We know which marketing efforts lead to meaningful conversations with prospective clients.
□ We review our marketing results at least once every three months.
□ We use what we learn to decide which activities to continue, improve, or stop.

Your 90-Day Marketing Action Plan

You don't need to fix everything at once. Review the items you left unchecked. Which three improvements would make the biggest difference for your firm?

Choose actions that are realistic for your team's time and resources.

Priority 1

What will we improve? _____
What is the first step? _____
Who will take the lead? _____
When will we complete it? _____
How will we know it worked? _____

Priority 2

What will we improve? _____
What is the first step? _____
Who will take the lead? _____
When will we complete it? _____
How will we know it worked? _____

Priority 3

What will we improve? _____
What is the first step? _____
Who will take the lead? _____
When will we complete it? _____
How will we know it worked? _____

One Last Question

If you could improve just one part of our marketing in the next 30 days, which change would help you attract more of the clients you want?

Our first move:
_____

Our 90-day review date:
_____

Remember:
A good marketing plan isn't about doing more. It's about doing the right things *consistently*.