

Marketing Readiness Checklist & Guide



Are you operating like a big firm when it comes to marketing?

Many accounting firms hit a growth ceiling not because of a lack of clients but because of limited time, tools, and team capacity.

Use this quick checklist to see how your firm compares to high-performing, “big firm” marketing teams.

Step 1: Where Are You Now?

A. Marketing Consistency

- We regularly send client newsletters or updates
- We post on social media or share content at least twice a month
- Our branding and tone are consistent across emails, website, and social channels
- We have a marketing calendar or plan for the next 3 months

B. Capacity & Support

- We have someone responsible for marketing and admin coordination
- Partners are not the ones writing or posting marketing content
- We have processes to track marketing results (open rates, inquiries, engagement)

C. Technology & Tools

- We use a marketing or email automation platform (like BOMA)
- Our client communications are templated or automated for consistency
- We have analytics or insights on which marketing efforts perform best

D. Growth & Visibility

- We actively promote advisory or high-value services
- We regularly update our website or Google profile
- We have the team capacity to handle more clients

Scoring Guide: Count your checkmarks:

0–4: Marketing Minimalist → You're surviving, not scaling.

5–8: Marketing Momentum → You're active but need structure and support.

9–12: Marketing Pro → You're marketing like the big firms — keep refining.

Step 2: How to Market Like a Big Accounting Firm (Without a Big Team)

Now that you've identified your strengths and gaps, here's how top-performing firms achieve big-firm visibility and consistency even with small teams.

1. Always On

Big firms stay visible through regular, automated client communication.

→ Adopt a marketing automation tool to schedule emails, newsletters, and posts that keep you top of mind year-round.

2. Consistent Branding

Big firms maintain one clear, professional voice.

→ Create reusable templates and brand guidelines so your communication looks and sounds consistent even when managed by support staff.

3. Multi-Channel Presence

Big firms reach clients wherever they are, across email, web, and social.

→ Automate content distribution so your firm appears active and approachable without daily manual effort.

4. Data-Driven Marketing

Big firms know what works.

→ Track your engagement metrics regularly to refine your strategy and focus your time where it delivers results.

5. Dedicated Marketing Capacity

Big firms have people focused on growth.

→ Add extra capacity through an offshore marketing or admin resource who can take ownership of day-to-day marketing tasks, freeing your partners to focus on clients and strategy.

Your Next Step

If you checked fewer than 8 boxes, your firm could benefit from two key enablers of growth:

1. Extra capacity from dedicated marketing or admin support (onshore or offshore), and
2. Marketing technology to automate routine tasks and maintain consistent communication.

Book your free 30-minute strategy call via the QR code below.

Get a personalised roadmap to identify your firm's capacity, marketing, and growth opportunities.

