

Best Practice Marketing AI Prompting Checklist for Accountants



This short guide introduces practical prompting techniques tailored for accountants, so you can brief AI clearly, get stronger first drafts, and stay firmly in control of technical accuracy and tone.

It also shows how to combine AI with BOMA's expert-written content library – using AI to customise and personalise trusted articles, rather than relying on it to invent tax or compliance content from scratch.

The CRAFT Framework for Basic Prompts

Use this structure for most marketing content requests:

- Context: Set the scene and background information
- Role: Define who the AI should act as (marketing expert, accountant, copywriter, etc.)
- Action: Specify exactly what you want the AI to do
- Format: Define the output format (email, social post, blog, FAQ, etc.)
- Target Audience: Describe who will read this content

You can also add Constraints (tone, length, don'ts) for more control.

1. Essential Setup Elements

Always include these in every prompt:

- Specify your accounting firm's niche (e.g. "small business accounting", "construction industry clients", "professional services").
- Define your target audience clearly (business owners, CFOs, landlords, sole traders).
- Set the tone (professional, friendly, plain English, educational, authoritative).
- Include word count or character limits where relevant ("max 120 words", "under 220 characters").
- Mention your country and tax jurisdiction for context (e.g. "UK, HMRC rules apply").

- State any must-include or must-avoid items (no jargon, no emojis, no US tax references, no promises of outcomes).

Example base prompt:

- You are a marketing and communication expert for a UK accounting firm.
- Write a [format] for [target audience] about [topic].
- Tone: [plain English, friendly but professional].
- Length: [X words].
- Include one clear call to action and avoid technical jargon.

2. Content-Specific Prompting Best Practices

For social media posts:

- Specify platform (LinkedIn, Facebook, Instagram, X) and character/hashtag limits.
- Ask for 2–3 alternative hooks or first lines.
- Request 2–3 hashtag options relevant to UK accounting and your niche.
- Ask for a question or prompt at the end to drive comments or replies.

For email marketing:

- Define type: announcement, deadline reminder, newsletter, nurture email.
- Ask for 3 subject line options and 2 pre-header options.
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- Include the segment (e.g. “UK VAT-registered small businesses on Xero”).
- Request one main CTA and keep the copy skimmable (short paragraphs, bullets).

For blog content and webpages:

- Provide 3–5 SEO phrases to weave in naturally.
- Ask for clear headings, subheadings and short paragraphs.
- Request practical steps or checklists, not theory.
- Ask for a suggested meta title and meta description at the end.

3. Advanced Prompting Frameworks (Simple Versions)

PAR (Problem–Action–Result) – for educational pieces

- Problem: [client pain point].
- Action: Write a [blog/email] explaining [solution] in plain English.
- Result: The content should position our firm as experts and encourage readers to [book a call / reply / download a guide].

GCT (Goal–Context–Task) – for how-to & explainer content

- Goal: [what you want the reader to do or understand].
- Context: [who they are + current situation, e.g. 'UK year-end approaching for small companies'].
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- Task: Create a [format] with [number] clear steps and a simple summary.

ACT (Audience–Context–Tone) – for relationship-building content

- Audience: [who].
- Context: [what has just happened – new law, Budget, deadline].
- Tone: [reassuring, down-to-earth, supportive].
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4. Quality Control Checklist (Non-Negotiable)

Before you use or send AI-generated content:

- Check all tax, compliance and regulatory points against trusted sources or BOMA content.
- Remove or correct any invented numbers, thresholds or dates.
- Confirm the content matches the right country and regime.
- Adjust language to match your firm's actual approach and specialisms.
- Add one or two real examples from your client base (anonymised).
- Strip out generic phrases that don't sound like you.

Red flags to watch for:

- Specific tax or accounting recommendations that you did not provide.
- References to US rules, IRS, or non-UK concepts for UK audiences.
- Over-confident statements ("this will guarantee...") or legal claims.
- Vague "consult a professional" lines if you are the professional – replace with a clear invitation to talk to your firm.

5. Efficient Workflow Prompts

Content calendar:

- Create a 4-week social media calendar for a UK accounting firm focused on [niche].
- Include a mix of tax reminders, cashflow tips, client success stories and FAQs.
- Format as a table with: date, platform, post angle, suggested hook, and CTA.

Client newsletter:

- Draft a one-page monthly email newsletter for [segment] covering:
 - 1) recent UK tax or regulatory changes
 - 2) key upcoming deadlines,
 - 3) one practical business improvement tip
- Use short sections, clear headings and one primary CTA.

Case study:

- Turn this anonymised client story into a short case study: [bullet point description].
- Use Problem–Approach–Result, keep it under 300 words, and end with a soft CTA.

6. Using AI to Customise BOMA Articles Safely

The safest and most effective use of AI for accountants is to customise trusted content, not to create technical content from scratch.

BOMA's articles are written and updated by financial journalists and accountants – use AI as the personalisation layer on top.

General customisation prompt:

You are a copywriter for a UK accounting firm. Take the following BOMA article and adapt it for [audience, e.g. 'hospitality businesses in Manchester'].

Keep all technical and tax details unchanged. Your job is only to:

- Simplify language to plain English
- Add examples relevant to [industry]
- Add a short intro and closing that sound like our firm.

Do not change any tax rates, dates, or HMRC rules.

Ideas for using AI with BOMA articles:

- Segment-specific versions
 - “Rewrite this BOMA article so it speaks directly to sole traders, using simple day-to-day examples.”
 - “Create a version for construction subcontractors under CIS, keeping all technical details intact.”
- Channel-specific snippets
 - “Turn this BOMA article into:
 - i. a 120-word email intro,
 - ii. three LinkedIn posts,
 - iii. two short FAQ answers for our website.”

7. Using AI to Customise BOMA Articles Safely

Tone and brand alignment

- Rewrite this article in our firm’s voice: warm, conversational, and plain English. Do not alter any numbers, thresholds, or deadlines.

Localisation and call-to-action

- Adapt this UK-wide BOMA article for clients in [region/city]. Add one local reference and end with an invitation to book a 20-minute call with our [job title]. Keep technical content unchanged.

Short client-facing explainer

- Summarise this BOMA article in 150 words for busy small business owners. Keep one key benefit, one risk if they ignore it, and one clear next step to contact us. Do not introduce any new technical details.

Always finish by manually checking that AI has not edited the technical core – the power is in combining BOMA’s expertise with AI’s speed.

8. Using AI to Customise BOMA Articles Safely

Treat prompts as assets you improve over time.

- Save your best prompts (those that produced content you actually used) into a shared “prompt library”.
- A/B test: ask for two versions with different tones or angles; see which gets more opens or clicks.
- Periodically refresh prompts as your niche or services evolve.
- Add a final line to key prompts: “Before you answer, ask me 3 clarification questions if anything is ambiguous.” – this often improves output significantly.

Prompt library essentials for an accounting firm:

- New-client welcome email template prompts
- Tax deadline and reminder email prompts
- “Turn this BOMA article into 3 LinkedIn posts” prompt
- FAQ-builder prompts for your website
- Webinar and event promotion prompts
- Proposal / engagement-letter explanation prompts (non-legal, client-friendly summaries)



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BOMA