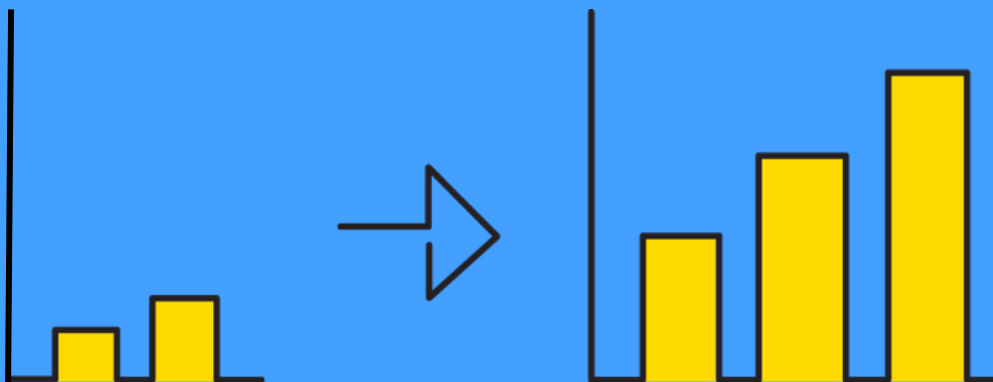


# The Accounting Firm Growth Engine Checklist



Most accounting firms aren't short of marketing ideas, they're short of a working marketing engine.

This 10-minute health check is designed for firm owners and partners who suspect their marketing isn't delivering growth, but aren't sure exactly where it's breaking down. Work through each section honestly, not aspirationally.

By the end, you'll have a clear picture of which part of the engine is missing, and where to focus first.

### **1. Strategy: Do we know what we're trying to do?**

- We have 3–4 clear marketing priorities (not 12 ideas)
- Our target audiences are agreed by partners
- We reuse themes instead of reinventing content each time
- Marketing activity aligns with firm growth goals

#### **If mostly unchecked:**

Your issue isn't effort – it's focus.

### **2. Platform: Is there a system supporting consistency?**

- We have a marketing automation or CRM platform in place
- Workflows are set up (emails, campaigns, reminders)
- Activity is scheduled in advance, not last minute
- We can see what's going out and when

#### **If mostly unchecked:**

The platform isn't the problem – the setup and use is.

### **3. People: Who actually owns execution?**

- Someone owns marketing execution end to end
- Someone owns some areas of marketing execution
- Day-to-day tasks are clearly delegated
- Execution continues even when the firm is busy

#### **If mostly unchecked:**

This is where most firms break. Marketing has no owner.

#### **4. Output: Is anything actually being delivered?**

- Marketing happens every month, not in bursts
- Content is repurposed across channels
- Campaigns are completed, not half-finished
- We don't rely on partner goodwill to get things out

#### **If mostly unchecked:**

You don't have a marketing problem – you have an execution gap.

#### **5. Automation vs Delegation: Are we using the right lever?**

##### **Automate:**

- Campaign scheduling
- Distribution workflows
- Nurture sequences
- Reminders and follow-ups

##### **Delegate:**

- Campaign builds
- Content formatting
- Platform setup & upkeep
- CRM maintenance

##### **Keep in-house:**

- Direction & priorities
- Subject matter expertise
- Final approvals (if needed)

## 6. The Reality Check

**Answer honestly:**

- Marketing runs without constant chasing
- Partners guide – they don't execute
- The platform is actively maintained
- Marketing would still run if one person left

**If you can't tick these → the engine isn't complete yet.**

### **Your Next Step (Don't Skip This)**

1. Identify one broken part of the engine
2. Fix ownership before adding more activity
3. Build a 90-day minimum viable marketing engine
4. Aim for consistency, not creativity

### **Key Takeaway**

- Platforms create leverage
- People make it real

**Marketing only works when both exist – and when someone owns the engine.**

# Your Next Step

**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.

