



Marketing Audit Checklist for Accounting Firms

Spot the gaps in your firm's marketing with
this quick self-assessment tool.

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Is your firm's marketing working as hard as you are?

For many accounting firms, marketing easily slips to the bottom of the to-do list. With the demands of client work and lack of dedicated internal marketing resources it is often overlooked or difficult to prioritise.

However, staying visible is essential if you want to attract new clients, build stronger relationships with existing ones, and show the real value of your services.

This quick self-audit will help you spot the gaps in your marketing foundations. From your brand to website and email communications to social proof and social media — tick through each section and see where you're on track, and where there's room to grow.

It's not about doing everything. It's about focusing on the areas that make the biggest difference for your clients and your firm's reputation.



Branding & Messaging

- ☐ Firm's unique value proposition (what sets you apart) is clearly defined
- ☐ Ideal client personas are defined and align with growth goals
- ☐ Brand voice and messaging are consistent across all channels
- ☐ Mission, values and employee value proposition are clear
- ☐ Brand story video created and live online



Website & Online Presence

- ☐ Website looks modern, professional and mobile-friendly
- ☐ Website includes core pages:
Home, About, Team, Services, Testimonials, Contact
- ☐ Team bios are up-to-date and include photos
- ☐ Testimonials or case studies are showcased
- ☐ Basic SEO in play - page titles, meta descriptions and keywords
- ☐ Website has a clear call-to-action:
Book a meeting link, Contact form, Call us
- ☐ Compliance covered - privacy policy, disclaimers, terms of engagement
- ☐ Memberships /certifications displayed e.g. CPA, Xero, TPB etc.



Email Marketing

- ☐ Regular client newsletter sent at least monthly
- ☐ Database segmented by clients and prospects. Plus clients by service, needs, age, industry, revenue etc. so you can send relevant value added insights
- ☐ Automated email sequences in place e.g. prospect nurture, client onboarding
- ☐ Email open/click rates are tracked

Social Media

- ☐ Firm has business pages on LinkedIn, Facebook and Instagram
- ☐ Pages are up-to-date and branded consistently
- ☐ Posting is regular and content includes education, services, team updates and client success stories
- ☐ Partners / Directors and client facing staff have optimised LinkedIn profiles



Google Business Profile

- ☐ Profile activated and contact details, hours and services accurate
- ☐ Regular updates or posts shared
- ☐ Google reviews are requested and responded to

Tracking & Analytics

- ☐ Google Analytics/GA4 is installed and working
- ☐ Website enquiries and phone calls are being tracked
- ☐ Email metrics (open/click rates) are reviewed
- ☐ Social engagement and reach are monitored
- ☐ Insights are used to improve future marketing decisions



How did your firm score?

- ✓ 20+ ticks → Your marketing is in great shape! A few tweaks will help you keep momentum.
- ✓ 10–19 ticks → You've got solid foundations, but some areas could use attention to keep your firm front of mind.
- ✓ 0–9 ticks → Time for a refresh. The good news? It doesn't need to be overwhelming. Start with one area and build from there.

If you would like help closing the gaps, that's where I come in.

At Sweet Style Marketing, I help accountants stay visible without the overwhelm — through practical, professional marketing support tailored to small firms.



To explore what your firm should focus on first, contact me for a conversation or visit www.sweetstylemarketing.com.au.

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