

Better CPA marketing starts before the copy is written

In this sample, 10 interviews with clients of the CPAs were completed, with about 20 minutes per interview. The range of questions created a strong base of specific answers, stories, testimonials, issues and other comments. Results are in useful in a number of ways. Analysis can deliver findings ready for marketing, client service and more.

Merida & Cole CPA: an illustrative two-partner firm. Client interviews give an agency evidence for positioning, content, nurturing and growth instead of asking the agency to invent differentiation.

For an agency, the Report is upstream research: it reveals what the CPA firm's best clients value, where prospects may misunderstand the firm, and which messages deserve to become campaigns, content and sales support.

Generic positioning

Issue: Many competent CPA firms sound alike because the website starts with service lists and adjectives rather than client evidence.

Illustration: The website says “full-service accounting with a personal touch.” Clients say, “they tell me what’s coming, not just what happened.”

Brief solution: Use interview language and stories as the raw material for positioning, homepage messaging, cases and referral content.

Content without a relationship trigger

Issue: A content calendar can stay busy without addressing the moments when client relationships are most vulnerable.

Illustration: 4 of 10 clients mentioned quiet periods; two had listened to competitors despite being broadly satisfied.

Brief solution: Create nurturing and between-engagement communications tied to the specific relationship gaps interviews uncover.

Unseen revenue inside the client base

Issue: Marketing is often aimed at net-new leads while current clients remain unaware of valuable services.

Illustration: 3 of 10 clients named advisory, planning or succession needs they did not connect with the firm.

Brief solution: Build targeted client-development and nurturing content around actual unmet awareness, not a generic service calendar.

Strategy without a benchmark

Issue: A client may resist changing messaging because neither the agency nor the firm can show which weakness actually matters.

Illustration: Proactive communication, ease of referral and advisory awareness all trailed the illustrative peer cohort.

Brief solution: Use comparable-firm benchmarks to justify priorities, support strategy discussions and focus the next content cycle.

One finding. Several actions.

A single client pattern can move from interview evidence to benchmark, operating action and communication.

WHAT CLIENTS SAID

“We don’t hear from them unless we call.” The issue appeared independently in several interviews.

WHAT IT MEANS

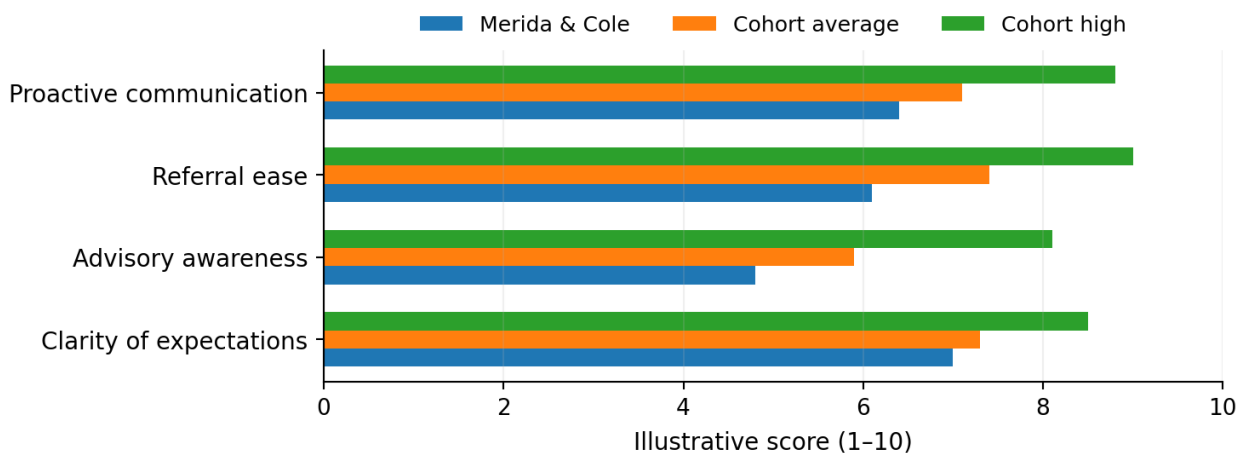
The weakness is not simply “brand awareness.” It is a relationship gap with churn, referral and cross-service consequences.

WHAT CHANGES

Build a quiet-season nurture sequence, a client story about proactive guidance, referral language and an advisory-awareness campaign — all from the same evidence.

HOW THE FIRM COMPARES WITH SIMILAR CPA FIRMS

The benchmark gives the agency a defensible reason to prioritize one message or campaign over another, rather than relying on preference alone.



Marketing Library — better raw material for the agency

- Positioning language based on how real clients describe value
- Client stories and proof points ready for creative development
- Nurturing themes tied to actual relationship gaps
- Service-awareness, referral, proposal and campaign content directions

What the full Report can contain

The Report is designed to sit upstream of strategy and creative work. It gives the agency a structured evidence base, then identifies the communications most worth developing.

ILLUSTRATIVE TABLE OF CONTENTS

The final scope is adjusted to the firm, interview findings and engagement level. This preview shows the kinds of sections that may follow the initial findings.

A. Research Base

- Interview method & sample
- Executive summary
- Key client segments

C. Peer Benchmark

- Trust-factor comparison
- Where the firm is undifferentiated
- Where the cohort leaders behave differently

B. Positioning Evidence

- Why clients chose the firm
- Language clients use to describe value
- Testimonials, stories & proof
- Decision and referral factors

D. Growth Opportunities

- Service-awareness gaps
- Existing-client expansion opportunities
- Nurturing triggers & retention risks

The agency's role stays intact

The Report should not look like a substitute for the agency. It provides research, evidence and client-sourced raw material. The agency remains responsible for brand strategy, creative judgment, design, implementation, media and ongoing marketing.

Illustrative composite example. Figures are sample values; no participating firm or individual is identifiable.