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## PARTNER AND SME IDEAS

An infrastructure of interviews, intake emails, briefings, and brainstorming sessions enables marketers to efficiently capture SME insights.

## 3 WORKFLOW

# THE CLIENT GUIDANCE AND THOUGHT LEADERSHIP BLUEPRINT

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## STYLE GUIDE

A style guide can bring

**A proven, scalable system for accounting and tax firm marketers to turn insights into publish-ready content—fast, consistently, and without overloading your team.**

# The Growing Demand for Client Guidance and Thought Leadership Content

I know how challenging it can be to manage thought leadership content and client guidance at an accounting and tax firm. I've worked with marketing directors at big and mid-market firms, and many face the same challenges.

Marketers are under increasing pressure to produce smart, timely content across multiple channels, without a larger team or budget. Content needs have ballooned in recent years. Accelerated by the pandemic, the shift to digital has compelled firms to expand their content across webinars, websites, blogs, and long-form assets. And in 2025, pressing issues such as international tax changes, tariffs, and changes from "The Big Beautiful Bill" are increasing the need for client guidance.

Firms that may have only dabbled in content must now join the conversation before they get drowned out by their competitors. Those that establish themselves as industry authorities through insightful and well-researched content are perceived as more trustworthy and competitive, leading to higher client acquisition, increased referrals, and stronger brand loyalty. And surveys indicate that buyers in professional services are more likely to engage with firms that demonstrate expertise and provide actionable insights.

However, marketers at many tax and accounting firms are struggling to keep pace. Most still operate with legacy processes, ad hoc requests, and over-reliance on overworked partners and subject matter experts. Without a scalable content operation and efficient process, even the most insightful firms struggle to keep pace.

This guide addresses the common challenges and outlines a scalable approach used by high-performing firms to overcome the chaos and establish a steady pipeline of strategic content.

# Why Firms Struggle: The 5 Bottlenecks Between Ideas and Published, Effective Content

Marketers at most tax and accounting firms strive to support thought leadership and client guidance. However, they face many headwinds and challenges that often create a bottleneck between ideas and polished, publishable content. Here are five of the most common issues I encounter:

## COMMON CHALLENGES IN PRODUCING CLIENT GUIDANCE AND THOUGHT LEADERSHIP



### No Content Strategy

Inconsistent, unplanned, just-in-time content, wasted effort, missed opportunities, poor ROI.

### Limited Bandwidth

Content production lags, performance suffers, subpar content, firm fails to adequately address key issues in a timely fashion.



### No Time

SMEs lack time, content lacks structure and is inconsistent, the review process becomes a burden, and brand trust erodes.

### No Content Repurposing Plan

Content becomes "one-off" assets and misses opportunities, ROI suffers, hard work, and effort are underutilized.



### No Engagement Tracking

Marketers don't track engagement beyond page views and clicks.



## No Clear Strategy and Plan

Many accounting and tax firms work without a defined plan. They respond to news, industry changes, or partner requests as they arise. If there's a "strategy," it's more of a to-do list with reactive responses and a "just-in-time" workflow. They struggle to produce content, and when they do, it's inconsistent and doesn't always align with the firm's priorities or meet strategic goals.

A lack of a solid strategy leads to wasted time, missed opportunities, and a poor return on investment. Content must serve both the firm's business development objectives and the needs of its clients; otherwise, it becomes performative instead of productive.

## Limited Bandwidth and Competing Priorities

Marketers at accounting and tax consulting firms often wear many hats. Juggling internal requests, client events, branding, and compliance leaves little time for creating thoughtful content. Even when a firm has an internal writer, they are typically focused on immediate needs and content assets, not on long-term strategy and cohesive content development.

Another common problem is that content not seen as immediately urgent often gets deprioritized. Without the bandwidth, the firm remains silent in key moments, often failing to address topics and issues that may be important to niche areas of the business.

## SMEs Lack Time and a System

While partners and directors are the firm's greatest asset for insight, they rarely have time to write. Good writing takes time and effort and can detract from meaningful, billable work. I've seen many projects get held up because executives and SMEs simply don't have the time for planning calls or interviews.

Many don't even get started because there's no system for generating and agreeing on ideas with the rest of the team. Even when they do get started, the content lacks structure or polish, and the review process becomes burdensome. Additional problems arise when multiple partners work on individual articles without a unified system guide. Some content assets are polished while others are casual, eroding brand trust.

Professional services firms rely on credibility with a clear, consistent tone that elevates the message and reflects professionalism. Without a shared language or editorial standards, the firm becomes forgettable or, worse, confusing.

## No Content Repurposing Strategy

I've seen a lot of good content go to waste, especially when a firm spends a couple of months publishing a high-value ebook, then lets it linger with no supplemental repurposing or promotion. Firms often publish a piece on the site and move on to the next one. Good content often goes underutilized, leaving opportunities on the table and yielding only a small portion of its possible return on investment.

Few firms have a solid plan to repurpose their existing content, expanding the reach of ideas across multiple platforms and touchpoints. Instead, they continually reinvent the wheel while repurposing could enable them to do more with less and expand their reach by showing up across multiple touchpoints.

## They Don't Track Engagement

While page views and clicks offer surface-level insights about content performance, they don't tell the whole story. For accounting and tax firms, effective content marketing hinges on engagement and return on investment, not just traffic.

Engagement metrics are crucial in client guidance and thought leadership in tax and accounting. Do readers go through full articles, or do they bounce after a couple of minutes? Do they respond with questions? Are read rates higher when sent as a link from a CPA versus posted on social media? Scroll depth, downloads, repeat visits, time on page, and comments can all help determine whether content is resonating with the right audience.

# A Scalable Client Guidance and Thought Leadership Blueprint

Even for busy marketers, content marketing doesn't need to be a scattered, unorganized effort. With a little upfront work on strategy, planning, and processes, they can transform SME ideas into publishable content with greater clarity and effectiveness. My 5-part blueprint and framework can help turn your firm's expertise into consistent, client-relevant content that builds authority and drives growth.



# 1. Build a Strategic Content Foundation

All good thought leadership and client guidance content is rooted in strategy. A strategic content foundation offers direction, consistency, and focus. This ensures that content efforts are proactive instead of reactive, and that everything the firm produces aligns with its goals and client needs.

A well-designed content strategy and plan should include:

- **Alignment with the firm's goals and priorities:** Ensures each piece of content supports broader business objectives, such as expanding into a new market, growing a practice area, or retaining key clients.
- **Seasonal and regulatory awareness:** Plans around tax cycles, legislative changes, industry deadlines, and timely topics that matter to the audience.
- **Tiered content planning:** Firms can organize content into three categories, including evergreen (timeless content that continually educates), opportunistic (timely takes on breaking news and regulatory shifts), and strategic (high-value thought leadership tied to campaigns or firm initiatives).
- **SME Directory:** Maintaining a list of go-to subject matter experts and owners by practice area and topic can speed up planning and ensure the right voice is brought in when needed.
- **Ideas:** Quarterly brainstorming sessions with SMEs and executives can yield content ideas and a roadmap for what to cover.
- **A "living" editorial calendar:** Use a shared calendar to map out content by theme, owner, and deadline with flexibility for fast-moving topics.

Content strategy isn't about producing more; it's about producing smarter with less noise. This makes content more purposeful and yields leverage and returns for the firm, not just output.

## 2. Design an Infrastructure to Capture Ideas

Many tax and accounting firms have marketing directors who generate ideas at a high level or seek insights from departments and SMEs. However, this often happens randomly without a systematic approach to capturing, organizing, and validating those ideas. They frequently take the form of conversations, scattered emails, and messages. To efficiently and effectively gather partner ideas without taking up too much of their time, marketers need to move from passive, sporadic requests to a structured and streamlined process. Instead of asking partners directly for ideas, provide a framework that elicits their expertise with minimal effort.

A structured intake system can include:

- **Short interviews:** These can often be more productive than long email exchanges and can include 4-5 questions like “What are the biggest challenges your clients are facing right now?” “What trends are clients not paying enough attention to?”
- **Guided intake forms:** These can be customized by service line or industry and can use checkbox prompts and short fields to collect quick answers.
- **Monthly “brain dumps”:** While many firms already have monthly meetings, they’re mostly geared to operations. However, partners and SMEs can also find content opportunities in these meetings.
- **Content briefings:** Send out a quarterly content briefing about upcoming content plans, needs, and ask for SME input on specific topics.

The key is to make communication about content a two-way street that’s easy, fast, and relevant. By lowering the barrier to participation and guiding the conversation, marketers can capture richer insights and save time for everyone involved.

## 3. Streamline the Production Workflow

Without structured workflows and templates, writing slows down, revisions accumulate, and SMEs bounce around seeking approvals. Building a reliable system and a repeatable process is essential. Having workflows and templates in place can reduce chaos, improve clarity, and streamline the process of moving content from ideas and drafts to published pieces with fewer headaches along the way.

## **Create a suite of models and templates**

Define what a “model” blog post, client guidance article, or an ebook looks like for your organization. Refine the style, word count, format, and flow for all content assets. Then use this to build partial templates for the most common formats, such as points of view, regulatory explanations, checklists, etc...All of these templates should include word count ranges, notes about voice and tone, required sections, and formatting guidelines. This will significantly help drafts come together with the same structure, be more on track, and faster with fewer revisions.

## **Create and Define a Production Workflow**

Outline each step in the process from ideation to publication such as:

- Assigning the content
- Writing the outline
- Reviewing and approving the outline
- Writing the first draft
- Reviewing and approving the first draft
- Writing the second draft
- Copy editing
- Legal review (if necessary)
- Art and design
- Publishing

## **Work Backwards and Create a Timeline of Deadlines**

For each of the workflow steps above, create a milestone with a date. Start by identifying a targeted publication date, then work backwards on each step to ensure enough time to reach the next milestone.

To ensure commitment, set realistic but firm turnaround times. While an ebook or long-form content asset can take a couple of months to complete, it shouldn't take more than 2-3 weeks to wrap up a thought leadership article.

## **Use a Single Source of Truth**

Version control can often become an issue when multiple iterations and drafts of a complex content asset are involved, with multiple people working on it.

From the start of the first outline, ensure there is one single version that everyone can work in, whether that's a Google Document or a Sharepoint file. Make it simple and seamless to collaborate across marketing, compliance and SME contributors and to ensure that everyone is on the same page reviewing the same version.

## Collaborate with Designers

Some content teams work through content and don't involve the designer until the final draft is completed. This approach may work well for simple blog posts and thought leadership articles, but designers should be brought on earlier in the process for long-form content, such as e-books, white papers, and reports. This is especially true when charts, graphs, and numerous illustrations are involved.

With more insight into the content development and more communication with writers and SMEs earlier in the process, the designer may often come up with creative ideas that they may not have considered otherwise.

## 4. Create a Style Guide

As you create more content and build your library, it's essential to maintain a consistent voice. When content varies in tone, structure, and clarity, it sends mixed messages that undermine the brand.

While it may require some upfront work, investing the time and effort to develop a company-wide style and tone guide is worthwhile. It should clearly define:

- The firm's voice (conversational but authoritative, expert but approachable, etc.)
- Do's and don'ts for grammar, tone, and formatting
- Preferred terminology for service lines and industries
- Examples of on-brand vs. off-brand writing

You can then pair this with an editorial checklist for each type of content. Before publication, every piece of content should be reviewed for consistency, clarity, tone, and brand alignment.

Another key step is to have an onboarding and training process for contributors, whether they are in-house marketers, SMEs, or external writers. This doesn't have to be anything extensive or complex. Oftentimes, a 30-minute call and some PDFs for reference can go a long way.

As the content grows, you may also consider quarterly content audits to identify outdated references, spot inconsistencies, and refresh top-performing assets. This can help keep your content sharp and align it with current messaging.

## 5. Design a Content Repurposing Strategy

Making the most of your thought leadership and client guidance content starts with thinking beyond “one and done.” Great content deserves a second and third life and should be repurposed into multiple formats to maximize its value, offering increased visibility, higher ROI, and greater efficiency.

Content repurposing is one of the most efficient ways for marketers in time-strapped positions to maximize the value of every idea. One study found that repurposed content can boost traffic by up to three to five times compared to one-off pieces, and that firms that repurpose content report higher lead generation and lower costs per lead.

Rather than publishing one-off pieces that become irrelevant and fall to the bottom of the barrel after each use, repurposing enables them to transform content into multiple formats, reaching different audiences, channels, and buyer stages.

For example, you can start with a “pillar” asset, such as a partner POV article, a regulatory analysis, or a client guide, and then break it down into smaller, more digestible pieces. A single white paper can be transformed into multiple thought leadership articles, a dozen LinkedIn posts, an infographic, a client email summary, or even internal talking points for business development. This increases visibility and reinforces the message across all touchpoints. It also enables marketers to stretch the life value of a content asset from weeks to months.

Repurposing also enables you to target content to platform behavior. For example, while a 2,000-word article may be ideal for a web or newsletter audience, key takeaways can be adapted into a LinkedIn carousel post or a short video script. This approach increases the likelihood of engagement while respecting different preferences about how audiences like to consume information.

The best way to approach repurposing is at the start, not as an afterthought. Create a repurposing checklist for each major asset and align content format to goals. By extracting more mileage from your best ideas, you can reduce content production burnout and generate stronger returns without constantly reinventing the wheel.

# Conclusion

You don't need more people or more work to create better client guidance and thought leadership content. You need a better system. With the right strategy, workflow, process, and infrastructure, accounting and tax firms can more easily publish high-quality client guidance and thought leadership that engages the market and yields and strong ROI.

## Additional Resources

**[Quarterly Content Planning Guide](#)**

**[Long Form Content Playbook](#)**

**[B2B Content Repurposing Guide](#)**

**[6 Secrets to Writing Great Thought Leadership Content](#)**

## Ready to Collaborate?

I help accounting and tax firms not only write content, but also plan, organize, and execute it. I can take the lead and work directly with partners to capture insights and shape raw input, bringing journalistic clarity to ideas and drafting client-ready pieces that require less back-and-forth in review.

As a neutral outside voice, I can also balance your firm's brand with the partner's point of view. I can work within your workflows, not around them, and help you create a system that makes thought leadership and client guidance more effective, targeted, and manageable.

And whether it's a one-off article around regulatory changes or a client guidance piece on niche needs, I help firms get more from every piece of content with a solid repurposing strategy, so your content works harder without creating more work. If you're ready to scale your thought leadership without overloading your team, I'd love to help.

Reach out at [craigguillot@gmail.com](mailto:craigguillot@gmail.com) or (504) 250-0347, and let's chat.