

Transforming Client Guidance at a Top 100 CPA Firm

A top 100 CPA firm in the United States with nearly 60 partners and more than 350 employees offers audit, tax, and consulting services for real estate companies, manufacturers, and professional services firms. The marketing team publishes client guidance and thought leadership on the “Insights” page of its website and through bi-weekly email campaigns.

The firm had published client guidance for years, but it lacked a rigid, formal process and workflow. SMEs and the marketing team generated ideas, but there was often a lack of alignment between the two. Some SMEs wrote their content independently, while others collaborated with the marketing director. The firm also worked with three outside freelance writers who occasionally helped with thought leadership articles and long-form content.

While the content was of decent quality, individual articles had inconsistent styles and tones. A lack of clarity around ideas and collaboration among the internal team often left client guidance and short articles tied up in reviews for weeks at a time. An even bigger issue was the sporadic publication schedule. The marketing team aimed to publish weekly, but bottlenecks in writing and review often resulted in weeks of no client guidance to publish.

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“There were so many gaps. We couldn’t get to everything we wanted to cover, and there were often difficult trade-offs due to time and budget. Ideas were often on the back burner,” said the firm’s marketing director.

During one 7-week period in 2025, hold-ups left the marketing team without any client guidance. It filled the gap with a few posts related to new hires and news about the firm.



The firm had worked on several thought leadership articles with Craig Guillot over the past couple of years, but learned about his strategy and planning services during a project kick-off call. The marketing team hired him for a custom content planning and roadmapping session.

Guillot reviewed the process and implemented some recommendations. First, he created an idea intake form for SMEs. This increased alignment and made it easier for SMEs and team members to propose and frame ideas around client challenges and firm solutions. Next, he worked with the marketing team to create a more structured workflow that for idea generation, outlining, writing, reviewing, and editing. This enabled the team to eliminate many inefficiencies and ramp up content production in-house and with freelancers. The marketing director noted that the writing process was reduced from more than a month to just a couple of weeks for most articles.

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Guillot also held a brainstorming and ideation session with the marketing team and 4 SMEs, then delivered a 3-month content roadmap and plan with content ideas and briefs for the firm’s main practice groups. This roadmap also included a “content tree” and repurposing framework that enabled the firm to get 2-3 times more reach from each content asset. For each thought leadership article, Guillot proposed a re-slanted article and three LinkedIn post idea outlines. SMEs then use these outlines to quickly personalize and schedule their posts, eliminating the ideation bottleneck.

“It has reduced the hassle for partners and our workload. We’re generating more content, they’re posting on LinkedIn, and we know what things look like a few months out instead of juggling last-minute articles,” she said.