



Digital Marketing for Accountants Template

Boost Your Brand Awareness, Revenue, and Reputation

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Digital Marketing Strategy Template for Accountants

Instructions

1. Complete all sections with specific, measurable goals.
2. Review and update monthly.
3. Track results against KPIs.
4. Adjust strategy based on performance data.
5. Share with team members for alignment.

This template is designed to be updated regularly as your digital marketing strategy evolves.

1. Target Market Analysis

Primary Client Persona

Category	Data
Industry	
Company Size	
Annual Revenue	
Key Pain Points	
Decision Makers	

2. Service Offering Focus

Primary Services to Promote:

- Tax Planning & Preparation
- Audit & Assurance
- Business Advisory
- Bookkeeping
- Other: _____

3. Digital Marketing Channels

Rate priority (1-5) and set monthly budget:

Category	Ranking (1-5)	Budget
Website Optimization		
Content Marketing		
Email Marketing		
Social Media Marketing		
Paid Advertising		

4. Content Calendar

Week 1:

Digital Marketing	Information
Blog Topic	
Social Posts	
Email Campaign	

Week 2:

Digital Marketing	Information
Blog Topic	
Social Posts	
Email Campaign	

Week 3:

Digital Marketing	Information
Blog Topic	
Social Posts	
Email Campaign	

Week 4:

Digital Marketing	Information
Blog Topic	

Social Posts	
Email Campaign	

5. KPI Tracking

Category	Monthly Targets
Website Visitors	
Lead Magnet Downloads	
Contact Form Submissions	
Consultation Bookings	
New Client Conversions	

6. Resource Allocation

Internal Team

Role	Name
Content Creation	
Social Media Management	
Email Marketing	

External Resources

Type	Name
SEO Agency	
Content Writers	
Web Developers	

7. Marketing Automation

Tools to Implement	Date Implemented
Email Marketing Automation	
Social Media Marketing Scheduling	
Lead Scoring	
CRM Integration	

Analytics Tracking	
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8. Monthly Budget Allocation

Total Monthly Budget: \$_____

Distribution	Percentage
Content Creation	
Paid Advertising	
Tools & Software	
External Services	
Other	

9. Quarterly Goals

Quarter	Traffic Goal	Lead Goal	Revenue Goal	Target Number
Q1				
Q2				
Q3				
Q4				

10. Review & Optimization Schedule

Category	Date
Monthly Review Date	
Quarterly Strategy Update	
Annual Planning Session	