The Discovery-to-Engagement Kit

A practical marketing field guide for accountants

Make your accounting offer easier to choose.

A complete marketing kit for accountants and bookkeeping firms: clarify monthly services, qualify inquiries, explain proposals and help suitable clients start with a well-defined engagement.



A clear offer. A useful conversation. A measurable process.

Includes a six-step guide, twelve original scripts, a 30-day plan and working pages for your own campaign.

Free edition / Version 1.0 / marketingcoach.cc

Your first useful result

Set aside 15 minutes. Start with one real decision in your business.

Do this first

Open one unanswered proposal. Check whether the prospect can identify the monthly deliverables, cleanup work, exclusions, responsibilities, price and start conditions. Clarify the missing item in one useful follow-up.

Who this is for

Independent accountants, CPA firms and bookkeeping practices offering recurring services to a clearly defined small-business audience.

The problem to solve

A business owner sees a list of services but cannot tell what they will receive each month, whether cleanup is included, or how switching providers will work.

What you will build

Build a clear service page, a focused discovery conversation, a readable proposal summary and a dependable onboarding handoff.

How to use the kit

Read the guide to understand the sequence. Use the workbench to draft your plan and messages. Review the same inquiry cohort in the scorecard. Keep private customer information in your existing systems. Export the workbench JSON to retain an editable backup.

Open the editable tools: marketingcoach.cc/downloads/industries/accountant/workbench.html

The workflow at a glance

Each step produces an artifact you can use. Keep the process visible to your team.

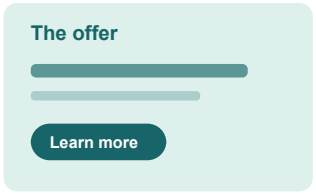
MarketingCoach / Accountants

A clearer path to a decision.

Small-business inquiry to a scoped monthly engagement

1 Define the monthly service

State the client type, deliverables, volume limits, fee assumptions and exclusions. Separate cleanup from recurring work.



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2 Make discovery focused

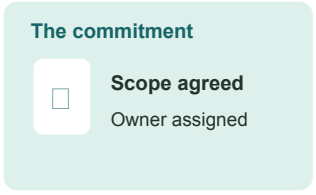
Discuss fit, current process, broad volume and timing. Use secure intake for records and avoid requesting passwords.



↓

3 Explain the commitment

Summarize scope, responsibilities, fees and start conditions. Use the approved engagement and onboarding process.



↓

4 Review the same cohort

Count relevant inquiries, calls held, proposals and accepted engagements. Track onboarding progress separately.



Keep one useful artifact from every step.

Build a page that helps people decide

Use this anatomy before adding more traffic.

MarketingCoach / Page anatomy

One page. One clear decision.

Your business

Know what your monthly bookkeeping includes.

See the deliverables, limits and responsibilities before you choose a service. Start with a focused discovery call to discuss fit and the work your business needs.



Request a discovery call

Make the practical details visible

Scope. Price. Timing. What happens next.

Show evidence people can assess.

Real credentials, a useful sample and clear process.

Explain the first step.

Who responds? How is the request confirmed?

1 **The promise**
Name the person and the decision.

2 **The action**
Say exactly what the click does.

3 **The details**
Answer scope, price and timing.

4 **The evidence**
Use facts you can substantiate.

5 **The handoff**
Explain what happens afterwards.

Fictional teaching example. Replace every example with your actual offer.

1. Choose a client type and a concrete monthly service

Read, apply, and keep the result.

Start with a client segment the practice can serve well: for example, owner-led service businesses with a straightforward bookkeeping process. "Accounting for everyone" makes scope and proof difficult to explain. Choose the operational situation, service boundary and capacity before writing a campaign.

List the work the client receives each month. Reconciliation, reports, a review meeting and response coverage are understandable deliverables when they are actually included. Specify entity count, account count, transaction-volume assumptions, reporting timetable and the information the client must provide. Use your own economics to set prices; the fictional kit price is not a market benchmark.

Separate initial cleanup or catch-up work from the recurring service. Identify payroll, sales tax, tax preparation, advisory, audit, review and other services individually; do not imply they are included or offered if they are not. Confirm any professional designation and the standards or local rules that apply to the actual practice.

Put it to work

Write a one-paragraph offer with client type, recurring deliverables, limits, price assumptions and the three most important exclusions.

You are done when

Someone unfamiliar with accounting can tell what is included, what costs extra and who the service fits.

Your notes

2. Turn the service page into a useful buying guide

Read, apply, and keep the result.

Lead with the client's operational need and the specific service. A headline about understanding the monthly scope is more useful than an unsupported promise of maximum savings. Show deliverables, pricing basis, boundaries and the first step near the top, then explain the reporting and onboarding process.

Use an actual team introduction and a sample report built with clearly fictional data. Annotate the sample to explain what a business owner can learn from it without presenting it as an audit opinion or a guaranteed business outcome. Verify credentials, designations and permissions for anything used as evidence.

Explain how discovery works, who joins the call and whether it has a fee. Make switching-provider questions easy to answer: when you assess the records, how you agree scope, what permissions you require and when a start date is confirmed. Direct documents to the approved portal, with no request for bank passwords or tax identifiers in a marketing form.

Put it to work

Use the annotated page graphic to check the promise, action, details, evidence and handoff. Build a draft with your own scope and booking route.

You are done when

The page answers what is included, what is excluded and what the owner must do first.

Your notes

3. Use discovery to establish fit and scope

Read, apply, and keep the result.

Give the call a short agenda. Ask about the business model, number of entities, current accounting process, broad account and transaction volume, reporting needs and desired timing. Discuss the situation at a high level. Move any sensitive record review into the practice's secure and authorized process.

Clarify who currently owns bookkeeping, who approves access, how far records are up to date and which other professionals are involved. Separate the owner's desired start date from a commitment the practice can actually make. If there is an approaching filing or payroll deadline, use the practice's approved escalation rather than a marketing sequence.

End with a clear outcome: a proposal, an authorized scoping step, a request for appropriate information, or a decision that the service is not a fit. Do not issue a proposal just to improve conversion metrics. A well-explained non-fit saves both parties time and protects delivery capacity.

Put it to work

Adapt the discovery agenda in the swipe file and add a secure route for any later record review.

You are done when

Each call ends with an owner, a documented scope question or decision, and an agreed follow-up date.

Your notes

4. Make the proposal and onboarding handoff explicit

Read, apply, and keep the result.

A useful proposal summary lets the owner compare the service with the problem they described. Include recurring deliverables, volume assumptions, cleanup work, exclusions, fees, client responsibilities, communication cadence and the conditions needed to begin. Avoid a menu of unexplained accounting terms.

Use the practice's approved engagement letter and acceptance process. The marketing template is a communication aid, not a substitute for engagement terms or professional judgment. Explain how changes in entities, transaction volume or service needs will be assessed, and how additional work is authorized.

Once accepted, assign an onboarding owner and confirm the authorized access method, required records, opening issues and expected reporting timetable. Confirm the first reporting date only when the prerequisites support it. Keep onboarding completion separate from engagement acceptance so a signed client does not disappear into an administrative gap.

Put it to work

Rewrite the first page of one proposal in plain language and test the accepted-client handoff with the onboarding owner.

You are done when

The client understands the scope and the team knows exactly what is needed before work starts.

Your notes

5. Create one practical article and one referral resource

Read, apply, and keep the result.

Publish a focused guide such as "What should monthly bookkeeping include?" or "What to prepare before switching bookkeeping providers." Explain the service decision, typical scope categories and questions to ask. Keep examples educational, with clearly fictional numbers and no personalized tax or financial recommendation.

Create a one-page service overview for appropriate existing business contacts. State the client type, offered services, boundaries and discovery route. If any referral fee, commission or reciprocal arrangement is involved, have the responsible professional review the rules and disclosures that apply before introducing it.

Use the same language on the article, service page and proposal. A reader should recognize the offer when they move between them. Begin with existing traffic and relationships, then review whether the practice can handle more suitable inquiries before considering paid promotion. Avoid refund or tax-savings promises as acquisition hooks.

Put it to work

Publish one service-scope article and share the factual overview with an appropriate existing referral contact when permitted.

You are done when

Every resource leads to a clear service page with a working discovery request.

Your notes

6. Measure engagement quality and delivery readiness

Read, apply, and keep the result.

Define a relevant inquiry using your client segment, offered service and capacity. Track one cohort through discovery held, proposal issued and accepted engagement. Leave pending proposals open until a reasonable review date instead of classifying every unaccepted proposal as lost.

Calculate stage conversion only when the denominator is available and the counts describe the same group. Separate inquiries from website clicks, accepted engagements from cash collected, and monthly contract value from earned revenue. The scorecard is a process aid, not an accounting or revenue-recognition system.

Review anonymous reasons for non-fit, delay or scope changes alongside the counts. If calls rarely produce proposals, inspect positioning and qualification. If proposals stall, inspect scope clarity and decision timing. If accepted clients struggle to start, inspect the onboarding requirements. Make one change and review comparable cohorts without claiming that a small sample proves the cause.

Put it to work

Review aggregate counts weekly and add a separate onboarding list in your approved practice system.

You are done when

The team improves one visible service or handoff issue while keeping client financial information secure.

Your notes

A worked example

Harbor Ledger (fictional) / Fictional teaching example

Audience

Owner-led service businesses seeking monthly bookkeeping and clearer reporting

Offer

A 20-minute discovery call at no charge. An illustrative monthly service is $650 for one entity, up to two bank or card accounts and 150 transactions, with reconciliation and a monthly report review. Cleanup, payroll, tax returns and assurance are excluded.

Capacity

Twelve discovery calls and three new monthly client starts available over four weeks

Budget

$0 new media spend; reserve four staff hours for service-page and proposal improvements

One cohort, four observations

Relevant inquiries: 18 | Starting cohort

Discovery calls held: 12 | 66.7% of previous stage

Proposals issued: 8 | 66.7% of previous stage

Engagements accepted: 3 | 37.5% of previous stage

What to investigate

Eight of twelve discovery calls produced proposals; check fit and missing scope information before assuming the others were lost. Three of eight proposals were accepted. Review exclusions, cleanup scope and start conditions with the remaining prospects; do not count pending decisions as permanent losses.

These counts are not client results, forecasts, targets or industry benchmarks. Follow the same group through the review window. Late decisions remain open until reviewed.

The original swipe file

Messages 1-3 of 12 / Adapt the brackets and review before use.

First inquiry reply

For a business owner who asked about your services.

Hi [first name], thanks for contacting [business]. We provide [service] for [client type]. A [duration] discovery call helps us understand your current process and whether our scope fits. The call costs [fee]. See the service details and request a time: [link]. Please do not send financial records or account credentials here.

Monthly scope explanation

Explain recurring work and exclusions in plain language.

Our monthly service includes [deliverables] for [entity, account and volume assumptions]. It excludes [cleanup, payroll, tax or other exclusions]. We confirm the scope and price after [approved scoping process]. Here is the service overview: [link].

Price question

Use the actual fee and assumptions, not the fictional kit price.

For [defined scope], our fee is [price and billing period], subject to [actual assumptions]. Initial cleanup and [excluded services] are assessed separately. We explain any additional work before you authorize it. Would you like to review whether this scope fits? [link]

Use appropriate contact preferences. Stop follow-up when the person replies, declines or asks you to stop. These are drafts for human review; the kit does not send messages.

The original swipe file

Messages 4-6 of 12 / Adapt the brackets and review before use.

Discovery agenda

Send after a call has been arranged.

For our [duration] call, we will discuss your business type, current bookkeeping process, broad transaction volume, reporting needs and timing. We will then agree whether a proposal or another scoping step makes sense. Please use [secure route] only if we separately request records; do not email passwords.

Call confirmation

Include practical details and a way to reschedule.

Your discovery call with [person] at [business] is confirmed for [date, time and time zone]. Join here: [meeting link]. The call fee is [fee]. If your availability changes, contact [contact]. Service overview: [link].

Discovery summary

Use anonymous scope categories in the draft; client details belong in your system.

Thank you for our conversation. We discussed [service need], [broad scope] and [desired timing]. The agreed next step is [approved scoping action] owned by [person] by [date]. We will confirm the proposed service and start conditions after that step.

Use appropriate contact preferences. Stop follow-up when the person replies, declines or asks you to stop. These are drafts for human review; the kit does not send messages.

The original swipe file

Messages 7-9 of 12 / Adapt the brackets and review before use.

Proposal cover note

Send with the approved proposal or engagement process.

Your proposed service is ready at [secure link]. It explains recurring deliverables, volume assumptions, cleanup work, exclusions, fees and your responsibilities. Please review the acceptance and start conditions. If anything differs from your understanding, contact [person] before proceeding.

Useful proposal follow-up

At the agreed decision date, focus on a specific open question.

Hi [first name], is the distinction between [recurring service] and [separate work] clear in the proposal? I can arrange a discussion about scope, fees or onboarding. If your timing has changed, let me know so we can update the follow-up plan.

Switching-provider reassurance

Describe the real transition process without guarantees.

Before confirming a start date, we agree the service scope, authorized access, available records and any cleanup needs. We coordinate the handoff through [approved process]. We will explain what you need to provide and confirm the first reporting timetable when the prerequisites are in place.

Use appropriate contact preferences. Stop follow-up when the person replies, declines or asks you to stop. These are drafts for human review; the kit does not send messages.

The original swipe file

Messages 10-12 of 12 / Adapt the brackets and review before use.

Onboarding welcome

Only after the practice accepts the engagement.

Welcome to [business]. Your onboarding contact is [person]. The approved checklist and secure access instructions are at [secure link]. Please complete [agreed prerequisites] by [date]. We will confirm the reporting timetable after reviewing them. Never send bank passwords by email.

Service explainer post

A public post with accurate scope and no financial-result promise.

What should monthly bookkeeping include? Start by checking the deliverables, account and transaction limits, reporting schedule, client responsibilities and exclusions. Our service page makes those details clear so you can assess fit before a discovery call: [link].

Professional referral overview

For an appropriate existing contact, without implying a paid referral arrangement.

For your reference, [business] provides [services] for [client segment]. Our current focus is [specific need], with [accurate service boundary]. Interested owners can review the scope and request a discovery call here: [link]. Please let them contact us directly rather than sending private financial information.

Use appropriate contact preferences. Stop follow-up when the person replies, declines or asks you to stop. These are drafts for human review; the kit does not send messages.

Your first 30 days

Choose a realistic owner and review date for each week.

Week 1 / Define the monthly offer

Choose the client segment; document deliverables, volume assumptions, exclusions, fee basis and capacity.

Keep: A clear service page

Week 2 / Improve discovery

Use the call agenda; assign inquiry coverage; adapt the scope and fee replies.

Keep: Each discovery call has a defined outcome

Week 3 / Clarify proposals

Revise the proposal summary; test secure onboarding; publish one service-scope article.

Keep: Proposal and handoff tested

Week 4 / Review and refine

Compare the same inquiry cohort; inspect pending decisions and onboarding readiness; improve one bottleneck.

Keep: One measured service improvement

Your campaign brief

Complete this before publishing or spending. Use anonymous business information.

Audience and specific situation

Offer, price and scope

Capacity, channel and budget

Owner and review date

Hypothesis: change, observation and reason

Your weekly scorecard

Track the same cohort. Do not mix new inquiries with bookings from earlier periods.

Cohort and review window

Relevant inquiries

Discovery calls held

Proposals issued

Engagements accepted

Observed questions or reasons for no decision

One improvement, owner and review date

Ready to launch?

Make the actual customer journey work before increasing distribution.

[ ] The offer, scope, price, capacity and terms are accurate.

[ ] Every placeholder and fictional business detail has been replaced.

[ ] Photos are permitted and claims have supporting evidence.

[ ] The primary action works on a phone and reaches the right destination.

[ ] The confirmation explains what happens next.

[ ] Someone owns responses and respects contact preferences.

[ ] Private customer information stays in approved systems.

[ ] Clicks, inquiries, bookings, completed work and revenue are separate.

[ ] The review uses the same cohort and allows time for delayed decisions.

[ ] The workbench has an exported editable backup.

Industry review

Keep tax returns, bank details, account numbers, payroll records and client identities out of this workbench and AI prompts. Use approved secure systems. Verify professional designations and service claims; do not promise tax savings, refunds, audit outcomes or financial results.

References and useful links

Original editorial workflows. Review requirements that apply to your business before launch.

AICPA Code of Professional Conduct: advertising and solicitation, section 1.600

https://pub.aicpa.org/codeofconduct/ethicsresources/et-cod.pdf

IRS: practitioner advertising and solicitation FAQ

https://www.irs.gov/tax-professionals/frequently-asked-questions

IRS Publication 4557: Safeguarding Taxpayer Data

https://www.irs.gov/pub/irs-pdf/p4557.pdf

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https://www.pexels.com/license/

Use and adaptation

Use and adapt the original templates in your own business. Share the kit page with others. Do not resell the kit or present fictional examples as your results. Stock photos remain subject to their source license.

Optional help with your real plan

The existing $350 Marketing Clarity Session reviews one audience, one offer and three priorities for the next 30 days. Review scope before booking.

https://marketingcoach.cc/services/marketing-clarity

Your online kit

https://marketingcoach.cc/resources/accountant-marketing-kit