THE PROFESSIONAL SERVICES MARKETING MEASUREMENT GUIDE

From visibility to valuable clients



A practical guide to measuring marketing performance for accountants, solicitors, financial advisers and consultants.

Azzurro | creative marketing that gets results

Introduction: Is your marketing working as hard as it should?

Marketing has never offered professional-services firms more ways to reach prospective clients.

Websites, search engines, LinkedIn, email marketing, digital advertising and thought leadership all create opportunities to demonstrate expertise and attract new business.

But greater activity doesn't necessarily mean better results.

A firm might publish regular content, attract website visitors and generate social-media engagement without knowing whether those activities contribute to new clients.

The challenge isn't simply producing more marketing.

It's understanding which activities make a commercial difference.

This guide will help you:

- Identify the marketing measures that matter.
- Understand how prospective clients discover and choose your firm.
- Track enquiries through to new business.
- Evaluate LinkedIn, website and content performance.
- Recognise where potential clients are being lost.
- Create a practical monthly marketing scorecard.

You don't need an expensive system or a dedicated marketing department to get started.

You need clear objectives, reliable information and a consistent way to evaluate results.

1. Start with your business objectives

Before measuring marketing performance, establish what you want marketing to achieve.

For example:

- **Attract more clients in a particular sector.**
- **Increase enquiries for a profitable service.**
- **Generate higher-value engagements.**
- **Develop relationships with business owners or directors.**
- **Improve the conversion of enquiries into clients.**
- **Strengthen the firm's reputation in a specialist market.**

Different objectives require different measures.

A firm seeking to develop its corporate law practice will have different priorities from an accountancy practice looking to attract local sole traders.

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Your marketing objectives

Complete the following:

Our most important business development objective:

- **The type of client we want to attract:**
- **The services we want to promote:**
- **The commercial result we want to achieve over the next 90 days:**

2. Understand the client journey

Professional-services clients rarely make immediate decisions.

They may discover your firm through a search engine, recommendation, LinkedIn post, professional directory or event.

They might then visit your website, read articles, compare credentials and review your team's experience.

Only later do they make an enquiry.

A simple client journey can be divided into five stages:

Awareness: The prospective client discovers your firm.

Consideration: They explore your services and expertise.

Trust: They look for reassurance, evidence and credibility.

Enquiry: They make contact to discuss their requirements.

Conversion: They become a client.

Marketing should support every stage.

If your firm is attracting attention but receiving few enquiries, the problem may not be visibility.

It could be unclear service information, weak calls to action or insufficient evidence of expertise.

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Quick exercise

For each stage, identify the content or activity your firm currently provides.

Stage	Current activity	Improvement needed
Awareness		
Consideration		
Trust		
Enquiry		
Conversion		

3. The seven measures that matter

1. Relevant audience reach

Are you reaching people who match your ideal client profile?

A large audience isn't necessarily a useful audience.

Focus on whether the people engaging with your content are relevant to your services.

2. Website engagement

How do visitors behave once they reach your website?

Look at visits to important service pages, engagement with specialist articles and the actions visitors take.

A visit alone isn't a commercial outcome.

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3. Qualified enquiries

How many enquiries come from people who genuinely need your services?

Record the service requested, the type of prospective client and whether the enquiry matches your target market.

4. Consultation or meeting rate

What proportion of qualified enquiries progress to a meaningful conversation?

This helps identify problems with follow-up, availability or initial qualification.

5. Proposal or instruction rate

How many consultations result in proposals, engagement letters or instructions?

The terminology will depend on the type of professional practice.

6. New-client conversion rate

How many qualified enquiries become paying clients?

Formula:

New clients ÷ Qualified enquiries × 100

For example, 5 new clients from 20 qualified enquiries represents a 25% conversion rate.

7. Client value

What is the commercial value of the business generated?

Depending on your practice, this might be:

- **Initial engagement value.**
- **Annual recurring fees.**
- **Expected lifetime value.**
- **Gross profit contribution.**

Use a consistent measure and avoid treating projected revenue as guaranteed income.

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4. Your monthly marketing scorecard

Complete this table every month.

Measure	This month	Last month	Target
Relevant website visits			
Qualified enquiries			
Initial consultations			
Proposals or instructions			
New clients			
New-client conversion rate			
Value of new business			
Marketing expenditure			

Review trends rather than reacting to a single month's results.

A firm with relatively few high-value engagements may need to assess performance quarterly rather than monthly.

5. Measuring LinkedIn properly

LinkedIn provides useful performance information, including impressions, engagement, followers and website clicks.

These are indicators of activity, not proof of commercial success.

To understand LinkedIn's contribution, record:

- **Which topics attract relevant decision-makers.**
- **Which posts encourage website visits.**
- **Whether content leads to direct messages or conversations.**
- **Whether prospective clients mention LinkedIn during enquiries.**
- **Which enquiries progress to new business.**

Encourage staff to record how new contacts discovered the firm.

Don't assume that a prospect who contacts you directly has never encountered your LinkedIn content.

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LinkedIn content review

Identify your three strongest posts from the past month.

Post 1:

Topic: _____

Relevant engagement: _____

Enquiries or conversations: _____

Post 2:

Topic: _____

Relevant engagement: _____

Enquiries or conversations: _____

Post 3:

Topic: _____

Relevant engagement: _____

Enquiries or conversations: _____

What do these posts reveal about the subjects that matter to your audience?

6. Find out where enquiries are being lost

Marketing performance can be weakened at several stages.

Good visibility, few website visits: Your content may be attracting attention without encouraging further action.

Strong website traffic, few enquiries: Your website may not explain your services clearly or provide sufficient reassurance.

Many enquiries, few consultations: Your targeting, response times or qualification process may need attention.

Many consultations, few new clients: Review your proposition, pricing communication, follow-up and suitability of enquiries.

New clients, limited profitability: Examine acquisition costs and the commercial value of engagements.

The purpose of measurement isn't to produce more reports.

It's to identify where a practical improvement could generate better results.

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7. Calculate your marketing return

Start with a straightforward calculation.

Marketing cost per new client:

Total marketing expenditure ÷ Number of new clients acquired

For example:

Marketing expenditure: £2,000

New clients: 4

Cost per new client: £500

Next, compare that figure with the value and profitability of the engagements generated.

A £500 acquisition cost might be entirely reasonable for a client producing substantial recurring fees.

It could be unsustainable for a small, one-off engagement.

For a fuller assessment, consider attributable revenue, gross profit, the time required to deliver services and how long clients typically remain with the firm.

Remember that marketing attribution is rarely perfect. Referrals, search, LinkedIn and previous contact may all influence the same decision.

8. Your 90-day improvement plan

Days 1–30: Establish the baseline

- Define your target clients and priority services.
- Review website and LinkedIn performance.
- Establish how enquiries are currently recorded.
- Identify your main sources of new business.
- Create your first monthly scorecard.

Days 31–60: Improve the client journey

- Review your most important service pages.
- Strengthen calls to action.
- Publish content addressing common client questions.
- Encourage professionals within the firm to share relevant expertise.
- Improve enquiry handling and follow-up.

Days 61–90: Evaluate and refine

- Review qualified enquiries and new-client conversions.
- Identify which content generated useful conversations.
- Compare marketing expenditure with commercial outcomes.
- Stop or revise activities producing little value.
- Prioritise the activities demonstrating the strongest potential.

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9. Your marketing health check

Tick each statement that accurately describes your firm.

- ☐ We have clearly defined our ideal clients.
- ☐ We know which services we most want to grow.
- ☐ We can identify our principal sources of enquiries.
- ☐ We distinguish qualified enquiries from general contacts.
- ☐ We track enquiries through to new clients.
- ☐ We understand which website pages generate enquiries.
- ☐ We evaluate LinkedIn beyond likes and impressions.
- ☐ We publish content that demonstrates relevant expertise.
- ☐ We have clear calls to action across our website.
- ☐ We review marketing performance at least quarterly.

Interpreting your results

8–10 boxes ticked: You have many of the foundations in place. Concentrate on improving measurement quality and commercial outcomes.

5–7 boxes ticked: There are opportunities to improve how marketing activity connects with business development.

0–4 boxes ticked: Establishing a simple measurement framework could help you make more informed marketing decisions.

This is a practical self-assessment, not an externally validated diagnostic score.

10. What should you do next?

The most effective marketing isn't necessarily the activity that generates the largest audience.

It's the activity that helps your firm attract suitable clients, demonstrate its expertise and develop profitable business relationships.

Start with three questions:

- Are we reaching the right people?
- Are we giving them sufficient reasons to trust us?
- Can we demonstrate that our marketing contributes to new business?

If you can't confidently answer all three, there may be opportunities to improve.

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About Azzurro Marketing

Azzurro Marketing helps businesses develop stronger brands, communicate more effectively and achieve better results from their marketing investment.

With more than 30 years' experience across branding, advertising and marketing, we combine strategic thinking with practical delivery.

Our services include marketing strategy, brand development, copywriting, content marketing, website design, SEO, digital advertising, email marketing and marketing analysis.

We work with businesses that want clear advice, creative thinking and marketing activity with a commercial purpose.

Is your marketing delivering the results it should?

If you'd like an independent perspective on your firm's marketing, we can review your current approach, identify potential weaknesses and recommend practical improvements.

Arrange an initial conversation with Azzurro Marketing.

www.azzurromarketing.co.uk/lets-meet

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Refreshingly different marketing.

*This guide provides general marketing information. Firms operating in regulated sectors should ensure that promotional content, data handling and client communications meet applicable professional and regul*atory requirements.



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