

# AI + Marketing: Let the bots do the hustle

xero

## AI isn't replacing you — it's just your new favorite intern (One that works 24/7 and never takes a coffee break)

Let's be clear: AI is not here to take your job. It's here to take the repetitive stuff off your plate, help you move faster, sound sharper, and reach more of the right people — without losing the voice that makes your firm your firm.

Whether you're just dipping your toe in or ready to cannonball into smarter marketing, this cheat sheet will help you bring AI into your workflow in a way that feels real, useful, and very you.

## Your 3-step plan to get rolling

### 1. PICK SOMETHING YOU ALREADY DO

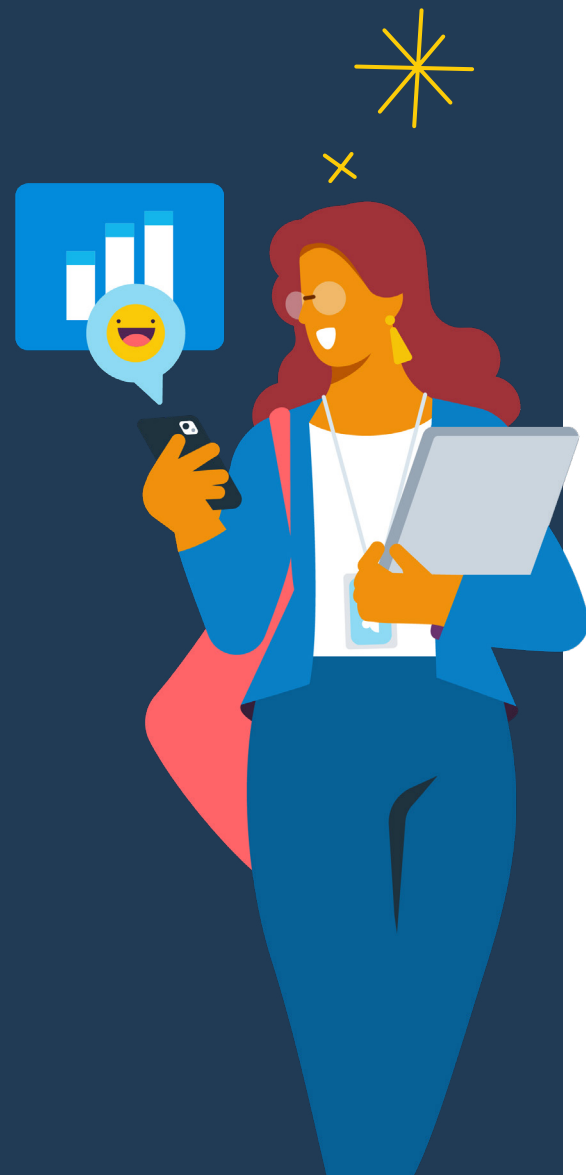
No need to start from scratch. Got a newsletter to write? A client email to send? A social post that's haunting your to-do list? Start there. Let AI help with what's already on your plate — just smarter.

### 2. USE THE 3PS: PROMPT, PERSONALIZE, POLISH

- **Prompt:** Be clear about what you want, and as verbose about it as you want until you get your point across. On a basic level, think: "Write a friendly reminder email for clients about Q2 tax deadlines. Audience: solo business owners. Tone: casual but competent."
- **Personalize:** Drop in firm-specific flavor — your client types, services, inside jokes, or that thing you always say.
- **Polish:** AI gets you 80% of the way. You add the magic. Edit so it sounds like you, not a toaster with WiFi.

### 3. SAVE THE GOOD STUFF

When a prompt works, don't let it vanish into the AI void. Save it. Same goes for polished drafts. Over time, you'll build a handy-dandy library of reusable content that makes future-you want to send past-you a thank-you card.



# Starter use cases

## USE CASE 1: DEFINE YOUR DREAM CLIENTS (NO VISION BOARDS REQUIRED!)

### Initial example prompt:

“Pretend you’re a marketing guru. Help me define an ideal client profile for a firm that loves working with [insert client type]. Feel free to ask nosy questions if you need more info.”

### Try prompting it with:

- What they struggle with
- Why they’re a joy to work with
- What makes your firm uniquely good at helping them

**Output to ask for:** Industry, addressable pain points, where they hang out online, what messaging they vibe with, and what tone to use when you talk to them.

## USE CASE 2: GIVE YOUR WEBSITE A GLOW-UP

### Initial example prompt:

“Rewrite this paragraph so it’s easy to understand for startup founders. This will sit on my website’s homepage, so make it count. First impressions are key, don’t embarrass me.”

### Follow-up prompt:

“Cool, now make it SEO-friendly for restaurant owners Googling ‘why are my books such a mess.’”

### Don’t forget voice direction:

“Keep it friendly, make it smart, and leave the accounting jargon at the door.”

## USE CASE 3: BUILD A SOCIAL CALENDAR WITHOUT CRYING INTO YOUR COFFEE

### Prompt:

“Make me a month of LinkedIn post ideas for an accounting firm that works with [insert client type]. Mix in helpful tips, fun behind-the-scenes stuff, and a couple of subtle flexes about how awesome we are. I’ve got [X] minutes per post and [X] hours a month to make this magic happen, and assume I only have access to an iPhone to record.”



## Other AI superpowers (that feel like marketing shortcuts)

### 1. TURN FAQs INTO BLOG POSTS YOUR CLIENTS MIGHT ACTUALLY READ

**Prompt:** “Take these 5 FAQs and turn them into short, friendly blog posts for creative entrepreneurs who still think bookkeeping is a dark art.”

### 2. TURN CLIENT CALLS INTO GOLD

**Prompt:** “From these call transcripts, pull out key pain points and goals — then write a snappy Instagram caption or a paragraph for our ‘About Us’ page.”

### 3. CREATE A ‘YOU MIGHT BE UNDERCHARGING IF...’ SERIES

**Prompt:** “Write 5 spicy Instagram captions about sneaky ways people accidentally undercharge for their services. Keep it playful, smart, and a little sassy.”

### 4. MAKE BORING STUFF INTERESTING

**Prompt:** “Explain the difference between cash flow and profit like you’re teaching it to someone who just opened an Etsy shop and is already panicking. Use food metaphors if needed.”

### 5. SEND CLIENTS LOVE NOTES THEY’LL ACTUALLY OPEN

**Prompt:** “Write a warm, one-year client anniversary email. Mention how we cleaned up their books, saved them 10+ hours a month, and made tax time less ‘AHHH!’ and more ‘ahhh.’”

## Try these easy prompts to dip your toe in

- “Write 3 versions of an email reminding clients about a tax deadline — one formal, one friendly, one with emojis.”
- “Turn this blog post into a LinkedIn update that sounds like something I’d actually say.”
- “Create an FAQ section for my monthly bookkeeping services that doesn’t make people’s eyes glaze over.”
- “Take this 5-star review and turn it into a thank-you Instagram post with a client quote.”
- “Write a caption for a photo of my team volunteering (bonus points if it makes us sound like superheroes in cardigans).”

## Final thoughts (a.k.a. your permission slip to start small)

You don’t need to go full robo-marketer. Just start with one task, one prompt, one small win.

Used thoughtfully, AI becomes your silent partner — helping you stay visible, consistent, and connected to the people who matter most: your clients.