



Tilbrook Consulting

# Business & Marketing Growth Report

Executive Summary • Market Insights • Competitive Review • Sales & AI Opportunities • Estimated Revenue Opportunity • 30-90 Day Action Plan

Prepared for	Summit Ledger Advisory
Report date	June 2026
Report focus	Authority positioning, target-client clarity, consultation conversion, referral strategy, and recurring-revenue opportunity for a professional services firm.

What this report provides	How business owners use it
A customized, plain-English review of the business, its customer visibility, local market context, competitive position, likely growth gaps, and next-step priorities.	Use the report to understand where growth may be blocked before spending more money on advertising, websites, social media, software, or outside services.

<b>WHY THIS MATTERS</b>	The report helps the owner focus on the growth issues most likely to affect customer action instead of treating every issue equally.
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# 1. What Business Owners Can Expect

This report is designed to answer practical questions: What is working? Where may growth be leaking? What should be improved first? Which actions are realistic over the next 30 to 90 days?

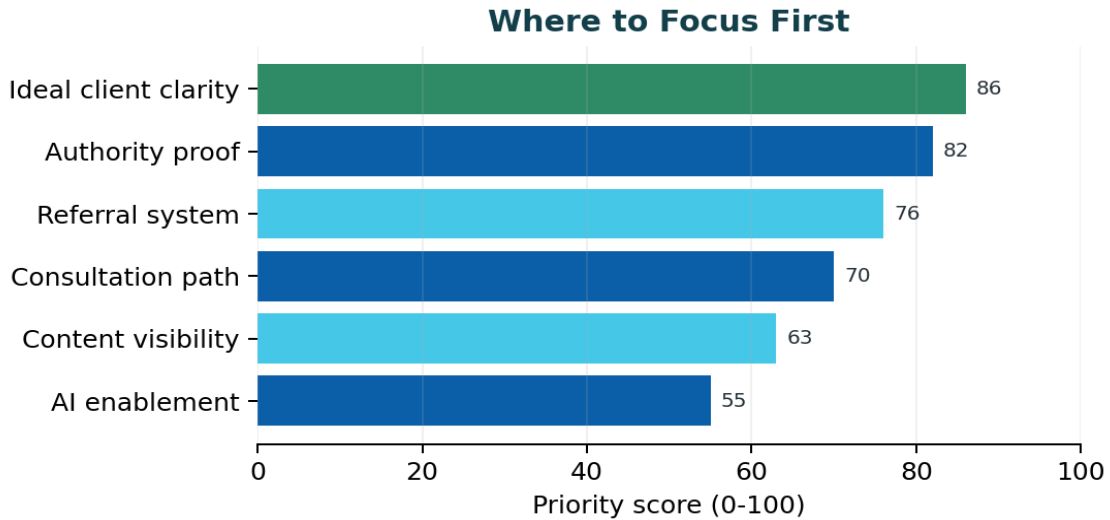
Information used	How it improves the report
Owner intake answers	Keeps recommendations aligned to the owner's goals, constraints, service area, and concerns.
Website and public online presence	Identifies positioning clarity, trust signals, calls to action, content gaps, and digital visibility issues.
Local market and competitor context	Shows where the business may stand out, fall behind, or need clearer differentiation.
Customer journey review	Turns scattered marketing activity into a simple view of where prospects may drop off.
Tilbrook growth framework	Prioritizes findings into practical next steps and a 30-90 day action plan.

## WHY THIS MATTERS

Business owners often have access to scattered information but limited time to interpret it. The value of the report is interpretation: what the information means, which gaps matter most, and what actions should come first.

## 2. Executive Summary

Summit Ledger Advisory appears to offer valuable professional expertise, but growth may be limited by broad positioning, limited authority proof, and an unclear path from website visitor to qualified consultation. The strongest opportunity is to define the ideal client profile, strengthen proof around outcomes, and create a referral and consultation system that converts better-fit prospects into recurring advisory relationships.



Finding	Why it matters	Priority
The ideal client profile should be sharper.	Professional services growth improves when messaging clearly identifies who the firm serves best and which problems it solves.	Highest
Authority proof is present but not packaged as buyer confidence.	Prospects may trust credentials, but they also need examples of outcomes, process, and client-fit stories.	High
Referral development appears informal.	A structured referral process can create higher-quality opportunities without relying only on web traffic.	High
Consultation CTA should pre-qualify prospects.	A clearer consultation path can reduce low-fit calls and increase better-fit discovery conversations.	Medium

<b>RECOMMENDED FIRST MOVE</b>	Define two ideal-client segments and create a consultation page that explains who the firm helps, the problems addressed, the advisory process, and what a qualified first conversation includes.
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### 3. Business Value Snapshot

This snapshot reviews how clearly the firm communicates expertise, client fit, trust, and the next step for a business owner deciding whether to request a consultation.

Assessment area	Score	Interpretation
Value proposition clarity	3.2 / 5	The service value is credible, but the business outcome and client fit should be clearer.
Target customer clarity	2.6 / 5	Too broad; stronger segmentation would improve relevance and referral quality.
Trust/reputation signals	3.5 / 5	Professional credibility exists, but proof should be organized around outcomes and client situations.
Consultation path clarity	3.0 / 5	The next step exists but should better explain fit, expectations, and preparation.
Service differentiation	2.8 / 5	The firm should distinguish advisory value from basic compliance or bookkeeping services.

Area	Observation	Recommended improvement
Homepage message	The firm likely explains services, but not enough about the client situations it is best built to solve.	Lead with client outcomes: cleaner books, better cash visibility, tax readiness, and owner decision support.
Ideal client segments	Different buyers may need bookkeeping cleanup, monthly advisory, tax planning, or controller-level support.	Create two or three segment paths by business size, stage, or pain point.
Proof points	Credentials are helpful but may not show outcomes.	Add anonymized client scenarios: before/after financial visibility, process improvements, and decision support.
Consultation CTA	A general contact form may attract unqualified inquiries.	Use Request an Advisory Fit Call with short pre-qualification questions.

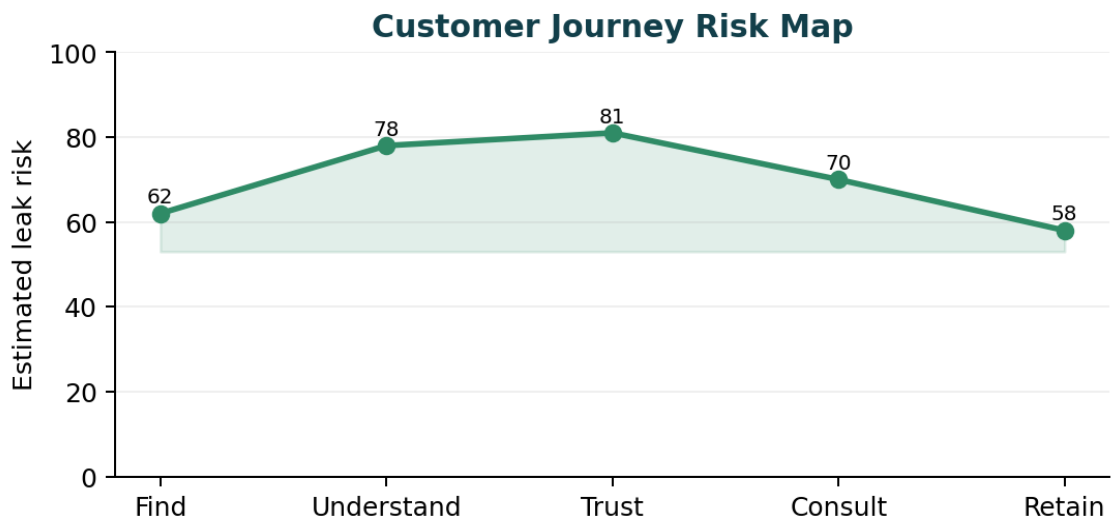
#### USE/VALUE ANNOTATION

Professional service buyers need confidence before they book a conversation. Clear client fit, outcomes, and process can improve inquiry quality and reduce time spent on poor-fit calls.

## 4. Local Market Analysis & Customer Context

For professional services, market opportunity is driven by trust, specialization, referrals, and perceived expertise. Local visibility can help, but buyer confidence often depends on whether the prospect believes the firm understands their specific business problem.

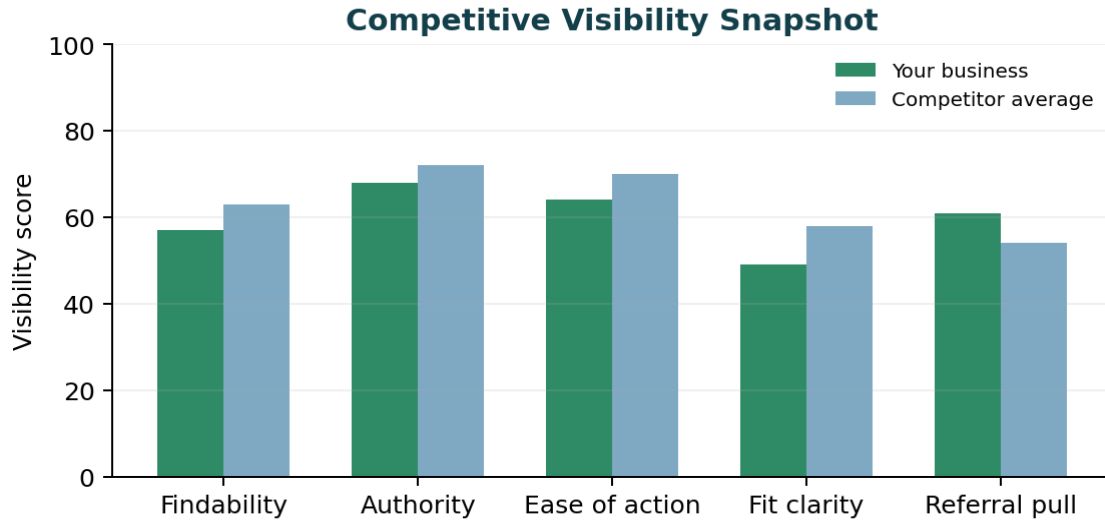
Local market evidence	What was reviewed	What it means for the owner
Target geography	Local and regional small businesses, with possible remote advisory clients.	Messaging should balance local trust with remote-capable advisory support.
Likely buyer types	Owners with messy books, growing businesses needing monthly visibility, tax-sensitive owners, and referral-driven prospects.	Segment content and CTAs around business pain rather than service labels alone.
Demand/search signals	Bookkeeping cleanup, monthly advisory, small business tax planning, outsourced controller, cash-flow visibility.	Search and content should address owner problems and decision triggers.
Local proof needs	Client scenarios, referral relationships, credentials, testimonials, and process explanation.	Proof should reduce risk and demonstrate professionalism.
Seasonal/community factors	Tax deadlines, year-end planning, quarterly estimates, business growth cycles.	Content and outreach should align with planning windows, not only tax season.
Data confidence	Directional; estimates should be refined with actual retainer value, lead count, and close rate.	Track consultation quality and recurring revenue conversion.



<b>USE/VALUE ANNOTATION</b>	This section helps the owner decide whether the priority is more web traffic, clearer specialization, stronger referral channels, or better consultation qualification.
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## 5. Competitive Visibility Review & Named Competitor Snapshot

Prospects may compare Summit Ledger Advisory against local bookkeeping firms, CPA firms, software-only solutions, and fractional finance providers. The growth opportunity is to communicate advisory value clearly enough that the firm is not compared only on hourly rate or tax-season availability.



Business	Customer-facing strength	Potential gap	Action idea
Summit Ledger Advisory	Credible professional expertise and advisory potential.	Ideal-client and outcome proof could be clearer.	Create segment-specific pages and advisory case scenarios.
Northside Bookkeeping Group	Simple service menu and easy entry point.	Less advisory positioning.	Match simplicity while emphasizing owner decision support.
Pinnacle CPA Partners	Strong credentials and tax credibility.	May appear less accessible for monthly support.	Show responsive advisory support and ongoing visibility.
Cloud Accounting Platforms	Low-cost software appeal and automation.	No strategic guidance or owner relationship.	Position the firm as technology-enabled human judgment.

<b>DECISION VALUE</b>	The firm should not compete only on service lists or price. It should show why the right professional guidance helps owners make better decisions, stay prepared, and avoid financial surprises.
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## 6. Customer Attraction Gap Review

Professional services prospects often drop off when they cannot tell whether a firm is the right fit, whether the service is more than basic compliance, or what happens during the first consultation.

Stage	What the customer needs	Possible leak	Recommended fix
Find	Discover the firm through local/referral/search paths.	Search content may be too service-label focused.	Create problem-based pages and referral-ready summaries.
Understand	Recognize that the firm solves their specific issue.	Messaging may not separate cleanup, advisory, and tax planning needs.	Build client-segment paths and service-fit language.
Trust	Believe the firm can handle sensitive financial work.	Proof may be too general or credential-based.	Add anonymized client scenarios and process explanation.
Consult	Know whether booking a call is appropriate.	The CTA may not pre-qualify or set expectations.	Use an advisory fit call with qualifying questions.
Retain	See the value of ongoing support.	Prospects may view the service as one-time bookkeeping or tax help.	Explain monthly advisory rhythm and owner decision value.

### USE/VALUE ANNOTATION

The firm may not need more generic traffic first. It may need a clearer path for the right business owner to recognize fit, trust the process, and request a qualified conversation.

## 7. Sales & AI Growth Opportunities

The most useful growth opportunities are tied to positioning, referral development, consultation conversion, and recurring advisory value. AI can help package expertise, but the business value comes from clearer specialization and stronger follow-through.

Opportunity	Business value	Revenue driver	Effort	First step
Ideal-client page	Helps qualified prospects recognize themselves.	Inquiry quality	Low	Create two client paths: Cleanup & Stabilize and Monthly Advisory.
Advisory fit call form	Filters inquiries and sets expectations.	Conversion efficiency	Low	Add 5 qualifying questions and clear first-call expectations.
Referral partner outreach	Creates higher-trust leads through attorneys, bankers, and business coaches.	Qualified referrals	Medium	Identify 12 referral partners and draft a short value note.
Client scenario library	Turns expertise into proof without disclosing sensitive details.	Trust and authority	Medium	Write 3 anonymized business-owner scenarios.
AI content assistant	Helps convert recurring owner questions into educational content.	Visibility and credibility	Low	Create monthly topics around tax readiness, cash flow, and owner dashboards.

### RECOMMENDED FIRST AI USE CASE

Use AI to draft plain-English educational content from common owner questions, then review for accuracy and tone. Good topics include cash-flow visibility, month-end close habits, tax readiness, and when to move from bookkeeping to advisory support.

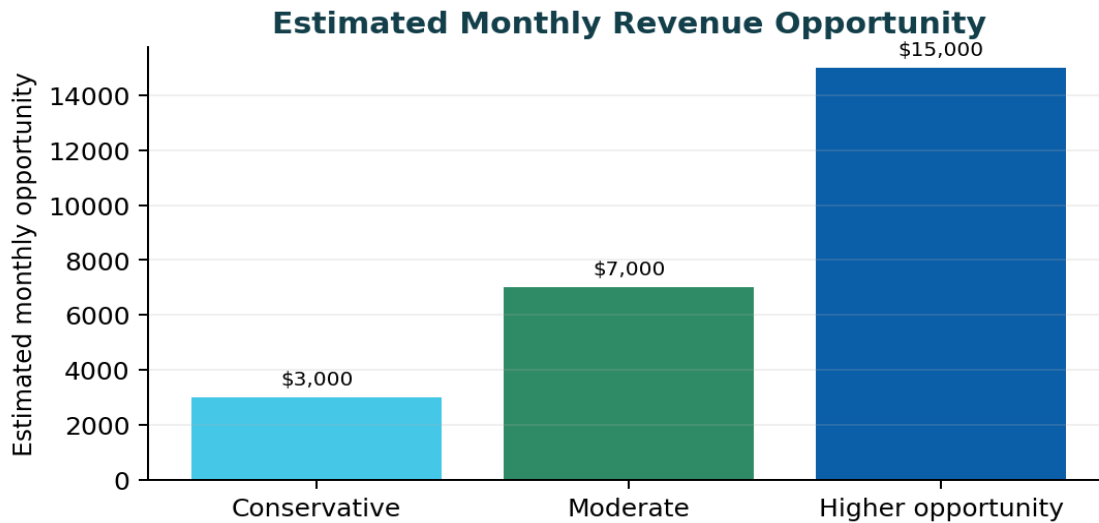
### WHY THIS MATTERS

The customer is buying growth guidance, not technology advice. AI should be presented as a practical support tool for clearer communication, better follow-up, stronger content, and more consistent execution.

## 8. Estimated Revenue Opportunity

The following directional estimate reflects a recurring professional services model. It assumes the firm can add new monthly advisory clients with an average monthly value of roughly \$1,800, while also improving consultation quality and referral flow.

Revenue driver	Current issue or opportunity	Possible business effect	Estimate confidence
Message clarity	Advisory value may not be distinguished from basic bookkeeping.	May improve perceived value and consultation quality.	Medium
Target customer focus	Ideal segments need sharper definition.	May attract better-fit recurring clients.	Medium
Authority proof	Outcomes are not fully packaged.	May increase trust and close rate.	Directional
Consultation path	Booking path may not pre-qualify prospects.	May improve consultation efficiency.	Medium
Referral consistency	Referral outreach appears informal.	May increase higher-quality leads.	Directional
Repeat/retainer value	Ongoing advisory value needs clearer explanation.	May improve retainer conversion.	Medium



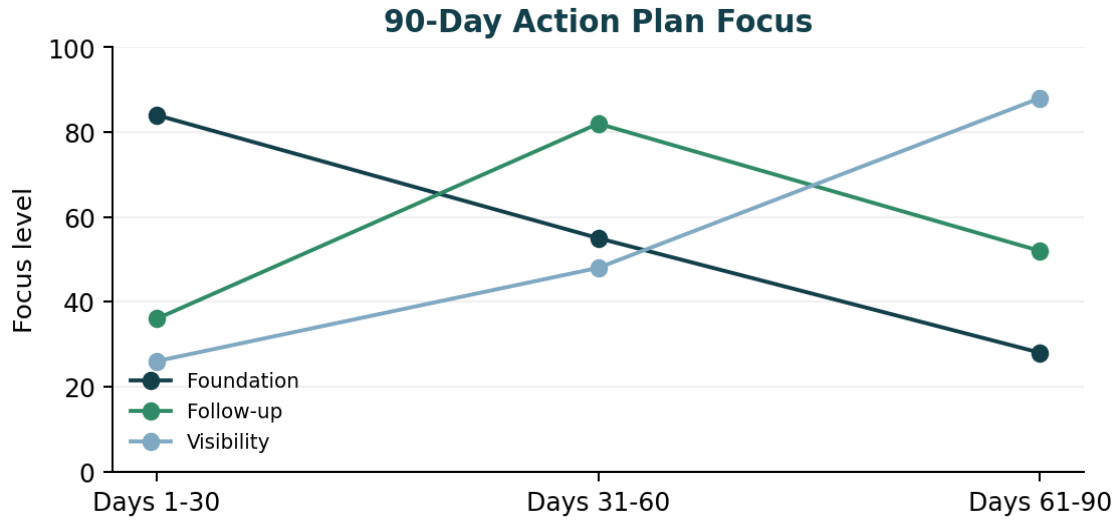
Scenario	Assumption	Estimated monthly opportunity	Estimated annualized opportunity
Conservative	One additional small advisory or cleanup-equivalent engagement every 1-2 months.	\$2,000 - \$4,000	\$24,000 - \$48,000
Moderate	Clearer positioning and referral outreach add 3-5 additional active advisory relationships over time.	\$5,000 - \$9,000	\$60,000 - \$108,000
Higher opportunity	Segment pages, referral system, and consultation qualification consistently add better-fit retainers.	\$12,000 - \$18,000	\$144,000 - \$216,000

**REVENUE OPPORTUNITY NOTE**

This is a directional revenue opportunity estimate, not a guaranteed result. Actual results will depend on execution, market conditions, pricing, capacity, customer demand, follow-up consistency, and the business owner's ability to implement the recommended actions.

## 9. 30-90 Day Action Plan

The action plan converts the findings into a short operating sequence. The goal is to fix the most practical growth constraints first, then expand visibility once the business is better prepared to convert customer interest.



Timing	Focus	Recommended actions	Success metric
Days 1-30	Foundation	Define two ideal-client segments; rewrite homepage promise; add advisory fit call CTA; outline client scenario topics.	Clearer fit and baseline consultation quality.
Days 31-60	Proof & referral	Publish two client-segment pages; create 3 anonymized scenarios; draft referral partner note and list.	More qualified conversations and referral outreach started.
Days 61-90	Visibility	Launch monthly educational content; test LinkedIn/referral content; review consultation-to-retainer conversion.	Improved authority, referrals, and recurring revenue pipeline.

<b>USE/VALUE ANNOTATION</b>	The plan prevents the report from becoming shelfware. It sequences recommendations so owners can start with realistic, high-leverage steps.
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## 10. What to Measure

The firm should track metrics that show whether it is attracting better-fit prospects and converting them into recurring advisory relationships.

What to measure	Example indicators	Review rhythm
Lead activity	Consultation requests, referral introductions, website form submissions, LinkedIn inquiries.	Weekly
Conversion activity	Fit calls completed, proposals sent, retainers accepted, average monthly fee.	Monthly
Trust signals	Testimonials, referral partner conversations, scenario page views, credentials visibility.	Monthly
Follow-up consistency	Post-consultation follow-up, proposal follow-up, referral partner touches.	Weekly
Recurring engagement	New retainers, retention, expansion opportunities, advisory meeting cadence.	Monthly/quarterly

### USE/VALUE ANNOTATION

Clear metrics help the owner know whether the next 30 to 90 days are producing better activity, stronger trust signals, improved responsiveness, and more customer action.

# 11. Conclusions and Recommended Next Step

Summit Ledger Advisory has a practical opportunity to grow by narrowing its target-client message, packaging proof around owner outcomes, and building a repeatable referral and consultation process. The most important gap is not expertise; it is making that expertise easier for the right business owner to recognize and act on.

Business owner question	How the report answers it
Where should I focus first?	Clarify ideal clients and the advisory consultation path before increasing general visibility.
Am I losing customers before they contact me?	Some prospects may leave because they cannot quickly tell whether the firm is built for their situation.
How do I compare with competitors?	The firm can stand out by explaining advisory value, not only service categories.
Can AI help practically?	Yes. AI can help draft educational content and follow-up messages, with professional review.
What should I do next?	Create ideal-client pages, a qualified consultation CTA, and a referral partner outreach list.

<b>RECOMMENDED NEXT STEP</b>	Begin with the first 30-day action list: define ideal-client segments, rewrite the homepage promise, and create the advisory fit call path.
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## 12. Sources and Notes

This website version is prepared for a fictional business and does not require live citations. In a completed customer report, this section would list the specific sources reviewed and provide citations or links for the information used.

Source category	How it would be cited in a completed customer report
Client-provided intake information	The intake date, responses reviewed, and any documents or notes provided by the customer would be listed here.
Business website and public online presence	The reviewed website pages, public business profiles, social channels, and relevant screenshots or page references would be cited here.
Local market and competitor information	Competitor websites, public review profiles, search observations, local market references, and any available third-party data would be cited here.
Revenue opportunity assumptions	Revenue ranges would list the assumptions used, such as average sale or project value, estimated inquiry volume, conversion range, and confidence level.

### NOTE

All revenue opportunity ranges are directional and intended to support prioritization. They are not forecasts or guarantees.