

# Professional Services Consult Authority Playbook

A practical playbook for professional-service firms that want stronger consult authority, better screening content, and clearer public answers before the first call.

Firm owners, intake leads, and marketers in legal, accounting, advisory, and consult-driven service businesses

## GUIDE

A practical playbook for professional-service firms that want stronger consult authority, better screening content, and clearer public answers before the first call.

## WHAT THIS ASSET COVERS

- A framework for identifying high-intent consult questions and authority gaps
- Guidance on which authority assets should sit near intake and consult pages
- A screening and routing structure for helping buyers understand fit and next steps sooner

## USE THIS WHEN

1. The firm gets many low-context consult requests
2. Public authority content is too generic to shape consult quality
3. You want a stronger trust layer around legal, accounting, or advisory intake

## WORKING ASSET

Build a stronger pre-consult authority layer so better-fit prospects arrive more prepared and more confident.

## CONSULT INTENT SIGNALS

Prospects usually reveal intent through:

- how urgent the issue is
- how specific the question is

- whether they are comparing providers
- whether they understand the process at all

Public pages should answer enough that serious prospects can self-orient before the first consult.

## **AUTHORITY ASSETS**

Prioritize assets like:

- founder or professional bios
- clear intake/process pages
- case-story snippets
- screening guides
- comparison content
- fit guidance and FAQs

## **SCREENING AND ROUTING**

Make the public layer help with:

- fit expectations
- who should book
- what information to prepare
- what happens next

This reduces low-context consults.

## **PAGE TYPES**

High-value pages often include:

- consult prep pages
- who-we-help pages
- process explainers
- objection FAQ pages
- comparison or fit pages

## **30-DAY ROLLOUT**

### **WEEK 1**

- identify authority gaps
- choose the highest-intent consult questions

## **WEEK 2**

- draft the first authority assets
- align them with intake and consult workflow

## **WEEK 3**

- publish and internally link

## **WEEK 4**

- review whether consult quality and fit improved

## **DEPLOYMENT NOTES**

### **HOW STRONG TEAMS ACTUALLY USE THIS ASSET**

- Assign one accountable owner instead of letting "Professional Services Consult Authority Playbook" become shared but unmanaged work.
- Use it with firm owners, intake leads, and marketers in legal, accounting, advisory, and consult-driven service businesses in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

### **BEST DEPLOYMENT SEQUENCE**

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### **WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE**

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
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Specific working components: A framework for identifying high-intent consult questions and authority gaps, Guidance on which authority assets should sit near intake and consult pages, A screening and routing structure for helping buyers understand fit and next steps sooner.

- A built-in review cadence so the document becomes part of operations rather than a one-time download.