

CASE STUDY

AI-Assisted Tax Research Product Launch

A Multinational Content-Driven Technology Conglomerate · Content Strategy & Campaign Marketing · Tax & Accounting

Overview

Tax research demands precision under deadline pressure. A single wrong conclusion carries real legal and financial risk for the professional and their client. When an AI-assisted tax research product entered the market promising to change that workflow, the content challenge matched the product challenge:

How do you help a risk-averse, detail-oriented audience trust a technology that changes how their work gets done?

This case study covers a full-funnel content campaign that ran before, during, and after a Tier 1 product launch. The product itself evolved during that time, from an AI-assisted research tool into a fully agentic AI tax workflow assistant. I led content strategy across every phase, turning complex product capabilities into audience-first thought leadership and campaign content that drove awareness, education, and pipeline growth.

The Challenge

The Audience

Tax and accounting professionals work where precision is non-negotiable. Errors carry legal and financial consequences, for clients and for the professional's own practice. That makes this a skeptical audience for new technology, especially AI. They needed to understand the tool before they could trust it, and trust it before they'd adopt it. **Content had to speak directly to their daily pain points:**

- Hours, sometimes days, spent researching a single complex tax question across scattered sources
- Difficulty keeping pace with fast-changing tax law, IRS guidance, and regulatory updates
- Pressure to give faster, more confident client advice in a competitive market
- Doubt that AI could meet the accuracy and citation standards their work demands

The Content

Launching a first product like this into a conservative professional market took more than promotional content. It took a **sustained, trust-building content strategy** that could:

- Build credibility and thought leadership in AI for tax before launch
- Turn dense, technical product capabilities into clear, benefit-driven messaging without losing professional credibility
- Adapt as the product itself changed, sometimes significantly, right up to launch day
- Align messaging across multiple internal segments and teams, each with its own stakeholders, approvals, and audiences

My Role & Strategy

I led content strategy for this launch, from pre-launch seeding through post-launch momentum. My role connected product marketing, demand generation, campaign planning, SEO, and editorial, turning product information into content strategy, and content strategy into execution.

Core responsibilities:

- Built and owned the full-funnel content strategy: what to create, in what format, for which audience segment, at what stage of the buyer journey
- Translated product-centric, technical information into customer-friendly, thought-leadership-driven messaging
- Advocated for content strategy decisions with campaign planning, product marketing, and demand generation teams, and explained the reasoning behind them
- Led and managed content creation across formats: writing, editing, briefing contributors, and overseeing approvals
- Tracked AI industry developments so content reflected current thinking and positioned the brand as a credible voice, not just a vendor
- Coordinated cross-segment content alignment, keeping messaging consistent and flagging where the launch mattered to adjacent audiences
- Managed legal, product, and compliance approvals across a high volume of assets on a compressed timeline
- Adapted content strategy and assets as the product changed, without losing campaign momentum

Content Produced

The campaign ran in three phases, moving the audience from awareness through evaluation to adoption.

PHASE 1 — SEEDING THE MARKET**Building trust before the product existed**

- Thought leadership blogs on AI's role in tax research and workflow
- Educational content answering “how does AI actually work for tax professionals,” building trust before the product ask
- Social campaigns positioning the organization as a voice in AI for tax and accounting
- Early-access and anticipation content for technology leaders and firm decision-makers

PHASE 2 — ANNOUNCING THE PRODUCT**Turning attention into pipeline**

- Launch blogs and announcements translated from product marketing into audience-first messaging
- White papers and ebooks on AI adoption for tax workflows
- Webcasts and video featuring internal experts and outside voices on real-world use
- Landing pages and campaign content built to convert informed prospects into leads
- Email nurture sequences by role and funnel stage

PHASE 3 — SUSTAINING MOMENTUM**Keeping the conversation going**

- Ongoing blog content tracking AI developments and reinforcing thought leadership
- Use-case and outcome content showing how the product performed in practice
- Cross-segment content adaptations for adjacent professional audiences
- Continued social and email campaigns to deepen engagement with existing prospects

Results

The campaign drove sustained gains in traffic, engagement, and pipeline over its multi-month run.

40% ORGANIC TRAFFIC	2,500+ NET NEW LEADS	3,000+ ASSET DOWNLOADS	9+ MONTHS IN ARC
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ADDITIONAL OUTCOMES

- Established the organization as a recognized thought leader in AI for tax and accounting, ahead of major competitors
- Pre-launch content drove 40% of launch-week traffic, evidence that the long-arc strategy worked
- Webcast and video content drew thousands of views

- Campaign content held a 40–60% bounce rate, against an 80% site average, indicating stronger audience engagement and relevance
- Content velocity rose from 2 assets per cycle to 3–5, without a drop in quality
- Equipped sales teams with dozens of campaign assets, extending content's reach into the full revenue cycle

Key Decisions & Challenges

Translating Product Complexity Into Audience Value

The most important content decision on this campaign was **committing to audience-first messaging from day one**. Product marketing speaks in features and capabilities: what the product does. My job was to redirect that toward what it means for a tax professional in front of a client, under a deadline, looking for a defensible answer. Every asset went through that translation: not “AI-assisted research” but “answers you can trust, faster.” That discipline is what made the content land with a skeptical audience.

Building a Thought Leadership Foundation Before the Product Ask

Rather than lead with the product, I **built the pre-launch content strategy around the audience's existing questions about AI in professional services**: What does AI actually do? How accurate is it? What happens to my judgment and expertise? By launch, the audience had already engaged with those questions, and the organization had established itself as a credible voice in that conversation. **The launch then read as a natural next step, not a pitch.**

Staying Agile Through a Moving Target

The product changed significantly in the months before launch, from an AI-assisted research tool to a fully agentic AI workflow assistant. Each change meant revisiting content strategy, updating or replacing assets, and re-briefing contributors. I managed this by **building flexibility into the content architecture from the start**: leading with benefit-driven, audience-centric messaging instead of feature claims that would go stale, and staying in close, ongoing contact with product marketing so changes were never a surprise.

Navigating Approvals at Scale and Speed

A launch this size required legal, compliance, and product review across a high volume of assets on a compressed timeline. I **built a proactive approval workflow**: batching content by type and risk level, flagging legally sensitive claims early in drafting instead of at the end, and keeping clear version control across assets. This cut revision cycles and kept the campaign on schedule as the product kept changing.

Cross-Segment Coordination

The product's use extended beyond the core tax audience into adjacent segments: audit, accounting, and technology leadership. Coordinating content strategy across these segments meant deciding where messaging could be shared or adapted and where it needed to be built from scratch, and aligning with segment-specific content leads to avoid duplication or conflict. The result was **a wider campaign footprint without a proportional rise in production demands**.

Reflection

This campaign confirmed something I already suspected: **the hardest work in content strategy happens before a word gets written.** It's the advocacy, translation, alignment, and judgment calls. Convincing stakeholders to lead with thought leadership instead of product promotion, to trust a long-arc strategy under pressure to show fast results, to slow the approval process down in order to speed up the timeline—these are the decisions that shaped the campaign's success as much as any single piece of content.

It also confirmed something about timing. The audience was ready to think seriously about AI in their workflow. They needed a trusted voice to lead that conversation first. By building that foundation early, the launch reached an audience already primed to listen.

The hardest work in content strategy happens before a word gets written.