

## Qualifications

**Specialization:** *The Specialists in CPA Marketing™* is widely recognized as the premier marketing firm in Southern California specializing in serving CPA firms. We understand how to market CPAs, from the smallest to the largest firms, as few others do.

**Full Range of High-Quality Services:** We offer virtually every marketing service that your firm might need. Our reputation is based upon delivering high-quality services with expertise, courtesy and professionalism.

**Marketing Experience:** Kevin W. Brown, M.B.A., is a true marketing professional with not only a formal education in marketing but also a background of over twenty years of in-house and consulting experience. As a recognized expert on CPA marketing, he has authored dozens of articles for national and local publications, and speaks regularly to Bar groups. He brings to each engagement a breadth of field knowledge and experience that is virtually unmatched.

**Business Experience:** Our business expertise is critical to our success. Kevin W. Brown is a career businessman with expertise in marketing. He has an M.B.A. in marketing and an undergraduate degree in business. His background includes positions with leading companies in banking, mergers & acquisitions, accounting and consulting.

**Strategic Insight:** We offer an unmatched ability to blend strategy with the selection of marketing tools. Our expertise is invaluable in helping you to chart a course, track progress, and make adjustments along the way.

**Productive Approach:** We have always operated on the basis of "A Business Approach to Marketing™." We identify goals up-front, then focus on strategy and business reasoning for any marketing actions.

Since 1991  
SoCal's Premier  
Marketing  
Firm  
Specializing in  
Serving  
CPAs

**The Specialists in CPA Marketing™**  
Founded 1991

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Throughout California  
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# Personal Coaching Services

Personal Marketing Plans

Business Development Coaching

Public Relations & Publicity

Business Development Training

Client Relations

Prospecting & Sales

Seeking new heights for your  
marketing?™



## Personal Marketing Plans

Our Personal Marketing Plans are tailored for your particular area of practice, targeted markets and marketing budget. There are numerous potential benefits of using these Plans:

- *Unified & focused marketing activities*
- *Identify & target your most profitable markets*
- *Establish realistic goals and objectives*
- *Selection of correct marketing techniques*
- *Create strategies and action steps that bring results*
- *Streamlined costs*
- *Maximize your efforts for the time expended*
- *Establishing an appropriate budget*
- *Develop attainable timetables*

## Business Development Coaching

We work with CPAs on an individual basis in business development. This may include: techniques to handle new client opportunities; consulting to improve their success rate in sales calls; targeting prospective clients; enhancing presentation skills; and personal branding/image building. These sessions can be done over the phone or in-person.

We also provide support such as: identifying and researching prospective clients; connecting with new referral sources; and drafting follow-up letters/emails to prospects or referral sources after meetings.

## Public Relations & Publicity

CPAs have limited time for public relations and publicity activities, so guidance is needed in selecting the correct techniques to promote their practice. Furthermore, ongoing support is required in order to make the process flow easily, attend to all the details, and maximize each opportunity. Our services include:

- **Professional Organizations** (organization selection, support, publicity opportunities, etc.)
- **Community Relations** (sponsorships, publicity opportunities, organization selection, etc.)
- **Speaking Engagements** (targeted campaigns, booking engagements, speech coaching, materials, follow-up programs)
- **Seminars and Conferences** (selection criteria, booking, event management, full support)
- **E-Communication:**
  - Social media
  - E-newsletters and e-blasts
  - Announcements
  - Website posts
  - Blogs
  - Advertising
- **Articles** (concept development, publication/media selection, editing, placement, distribution)
- **Media Relations:**
  - Internet
  - Newspaper, magazines and trade publications
  - Radio and television
  - Media kits
  - News releases
  - Feature articles
  - Interviews/quotes

## Business Development Training

Do you need to improve your skills in generating new business? If so, ***The Specialists in CPA Marketing™'s "Rainmaker & Business Development Training for CPAs"*** may be the solution for you. We offer several training courses such as:

### Business Development courses:

- *Marketing for CPAs & Essential Rainmaker Skills*
- *How to Optimize Your Referral/Networking Relationships*
- *Personal Branding: Raising Your Profile*
- *Developing Your Own Personal Marketing Plan*
- *Maximizing Involvement in Professional & Community Organizations*
- *Social Media and Digital Marketing*
- *Professional Selling Skills for CPAs*
- *How to Use Business Presentations to Gain Referrals and Clients*

### Client Relations courses:

- *Understanding Client Expectations*
- *Techniques for Quality Client Service*
- *Cross-Selling & How to Obtain More Business from Your Clients*
- *Essentials for Retaining Clients*
- *Dealing with Problem Situations*

## Prospecting & Sales

- *New business generation programs*
- *Identifying/targeting profitable markets*
- *Branding and positioning strategies*
- *Sales opportunity consultations*
- *Internet marketing strategies*
- *Direct mail programs*
- *Proposals*
- *Speech support (coaching, visual aids, hand-outs, sales follow-up)*
- *Seminar management and marketing*