

Qualifications

The Specialists in CPA Marketing™, founded in 1991, specializes in serving CPA firms. The firm's clients range from some of the country's largest CPA firms to local and regional firms.

Our Founder

Kevin W. Brown, M.B.A., is a recognized expert on CPA marketing with over 20 years experience. From the beginning of his firm, Kevin developed many new, innovative concepts and techniques that are proprietary to his firm, including the unique *"Part-Time Director of Marketing™"* service.

Experience

In addition to serving over 300 firms since 1991, Kevin has extensive in-house experience. Prior to founding ***The Specialists in CPA Marketing™*** in 1991, Kevin was the Director of Marketing for Deloitte in Orange County, where he created and managed a comprehensive marketing department. His background also includes positions in strategic consulting and commercial banking. Through this breadth of experience he has developed a well-rounded business perspective that is quite valuable in the marketing process.

Education

Academically, Kevin has earned a Master of Business Administration degree in Marketing from California State University, Fullerton and a Bachelor of Science degree in Economics and Management from the University of California, Riverside.

Speaking Engagements and Articles

Kevin is author of over 100 articles published nationwide and locally. He regularly speaks to CPA firms and organizations, including CalCPA chapters and AICPA groups. Kevin has been invited to speak at national conferences in locations such as Washington, D.C., Atlanta, Denver, Phoenix, San Francisco, Los Angeles and other locations. He has provided training to firms of all sizes.

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

The Specialists in CPA Marketing™
Founded 1991

Contact:

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& Nationwide**

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Business Development Training for CPA Firms

**Seeking new heights for your
marketing?™**

Business Development Training for CPAs: Curriculum

Do your CPAs, both partners and staff, need to improve their skills in generating new business? If so, **The Specialists in CPA Marketing™**'s *"Business Development Training for CPAs"* may be the solution for your firm. This program is designed specifically for CPAs and the practice development challenges they encounter.

Day-Long Training or Short Workshops:

The Specialists in CPA Marketing™ offers numerous course options, which can either be done as a *"One-Day Comprehensive Training Program"* or as a 2-3 hour *"Periodic Workshop"* training session(s). You may select from any of the topics below. For *Periodic Workshops*, we suggest weekly, monthly, bi-monthly or quarterly training.

Format:

All training is lead by Kevin W. Brown, M.B.A., and is designed around an extensive handout package that includes useful action steps, checklists, forms and worksheets, helping your CPAs to learn and apply key rainmaking and practice development concepts. Class size is limited to a maximum of 20, which allows effective role-playing and discussion groups. The presentation will be held at your offices. Time length for *Periodic Workshops* is designed to be 2-3 hours.

Cost:

Cost for the *One-Day Comprehensive Training Program* is \$3,500 (you may select any four of the sessions below). Cost for the *Periodic Training Workshops* is \$1,000 each (local area only; contact us for out-of-area training). Cost includes handout materials for up to 20 personnel. Customized workshops, varying from the descriptions below, are available at additional cost.

Training Topics:

I. Marketing for CPAs & Essential Rainmaker Skills

II. How to Optimize Your Referral/Networking Relationships

III. Professional Selling Skills for CPAs

IV. Social Media and Digital Marketing

V. Maximizing Involvement in Professional & Community Organizations

VI. Personal Branding: Raising Your Profile

VII. How to Use Business Presentations to Gain Referrals and Clients

VIII. Cross-Selling & How to Obtain More Business from Your Clients

IX. Keys to Effective Client Service

X. Developing Your Own Personal Marketing Plan