

## 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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# Client Service Training for CPA Firms

## Training Topics:

Understanding Client  
Expectations

Keys to  
Effective Client Service

Essentials for  
Retaining Clients

Dealing with Problem Situations

Seeking new heights for your  
marketing?™

# Client Service Training: Curriculum

From a business perspective, keeping a satisfied client is a lot cheaper than gaining a new client. Furthermore, your competition is likely seeking methods to attract your clients, especially if your firm fails to provide a superior level of client service. For these and many more reasons, it is important to train all client-contact personnel in client service. Through these series of workshops, professionals and administrative staff will develop a better understanding of how to effectively serve clients, what is necessary to retain clients, and how to handle problems that arise. All of this material is presented from the client's perspective, a process which is enlightening and creates many new opportunities to improve overall client service. This program is designed specifically for CPAs and the client service challenges they encounter.

## Day-Long Training or Short Workshops:

*The Specialists in CPA Marketing™* offers four different sessions, which can either be done as a “*One-Day Comprehensive Training Program*” or as a 2 hour “*Periodic Workshop*” training session(s). You may select from any of the topics below. For *Periodic Workshops*, we suggest weekly, monthly or bi-monthly 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 client service concepts. Class size is limited to a maximum of 20, which allows effective discussion and learning. The presentation will be held at your offices.

### Cost:

Cost for the *One-Day Comprehensive Training Program* is \$3,500 for all 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. Understanding Client Expectations:

This workshop discusses client expectations, including value issues, communication, fees and relationships. Professionals and staff will learn how to assess and evaluate needs for existing clients, as well as how to handle new client inquiries. The role of personality types and communication styles are also discussed.

### II. Keys to Effective Client Service:

This workshop covers a wide breadth of material, including how to develop a client-driven culture, new client handling, crucial components of client communication, and the fundamentals of telephone etiquette.

### III. Essentials for Retaining Clients:

In this workshop we evaluate why clients might leave a professional services provider, client retention essentials, gaining feedback and client relationship maintenance. We also consider red flags that might indicate it is time to manage out or fire a client.

### IV. Dealing with Problem Situations:

Whether problems with clients are frequent or infrequent, it is imperative to learn techniques to effectively address these situations. This workshop discusses how to pinpoint problems and find solutions, proactive problem solving, how to handle angry clients, and winning back lost clients.