

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



**The Specialists  
in CPA Marketing™**

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# What Makes Us Unique?

**Specialization:** Founded 1991, *The Specialists in CPA Marketing*™ is widely recognized as a premier marketing firm in California specializing in serving CPA firms. We understand how to market CPA firms, from the smallest to the largest firms, as few others do!

Our clients include some of California's most well-known firms as well as many smaller firms. We also serve selected clients across the nation -- work that has been gained due to our reputation and expertise.

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

We provide full-service marketing support for CPA firms, either as your "Part-Time Director of Marketing™" (outsourced marketing department) or Project-Oriented services (Marketing Planning & Analysis, Business Development, Branding & Positioning, Digital Marketing, Advertising & Marketing Materials, and Public Relations & Publicity). We offer virtually every marketing service that your firm might need. Our reputation is based upon designing and implementing 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-five years of in-house and consulting experience. As a recognized expert in CPA marketing, he has authored dozens of articles for national and local publications, and speaks regularly to organizations.

**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:** *The Specialists in CPA Marketing*™ offers 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 upfront and make sure that there is a strategy and business reasoning behind marketing actions.

**Initiative:** At *The Specialists in CPA Marketing*™, we make your life easier by taking care of all the details. Our desire is to be actively involved in managing and implementing our clients' marketing programs. For those clients who desire ongoing support, they hire us for our unique "Part-Time Director of Marketing™" service (we were, as far as we know, the first firm in the U.S.A. to offer such a service).

# Our Nationally-Recognized Founder

**Kevin W. Brown, M.B.A.** is known as a pioneer and leading-edge expert in the field of CPA marketing. From the beginning of his firm, Kevin developed many new, innovative concepts and techniques that are proprietary to his firm, including a unique *"Part-Time Director of Marketing™"* service, which offers his expertise at an affordable rate to smaller firms.

Since founding his firm in 1991 he has worked with hundreds of firms, from the nation's largest firms to regional firms to small local practices, in designing and implementing effective marketing programs.



## **Experience and Education**

Prior to forming his own firm in 1991, Kevin was the Director of Marketing for Deloitte, Orange County's largest professional services firm with over 400 employees. He also worked in investment banking as a strategic consultant at Geneva Companies, and in commercial banking with Bank of America, working as a corporate banking officer and financial analyst serving clients with loans from \$1-200 million. He received his M.B.A. degree in marketing from California State University, Fullerton and a B.S. in economics and management from the University of California, Riverside. This background provides Kevin a unique perspective on business management and the marketing process.

## **Speaking Engagements and Articles:**

Kevin is author of over 100 articles published nationwide and locally. A clear, dynamic, and diplomatic speaker, Kevin regularly speaks on various marketing and business development topics to CPA firms and organizations. He 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.

## **Personal Interests**

Kevin's free time is filled with diverse activities, from myriad physical activities (bicycling, kayaking, and numerous sports) to outdoor adventures (e.g., camping, hiking, snorkeling, backpacking) to enjoying cultural pursuits (travel, museums, visual and performing arts, etc.). He is never one to lack an interest in learning more and exploring nature and societies.

Along with his wife and four sons (all Eagle Scouts), Kevin is an active member in church activities and youth volunteerism. He is an Eagle Scout and served in Boy Scout leadership for 19 years. He also has served as a leader and volunteer for many other youth organizations, including YMCA Indian Guides and coaching over 80 sports teams over the last 20 years in Little League baseball, Pony Baseball, Boys & Girls Club, NJB basketball, Upward basketball, Pacific Coast Hoops basketball, HB City Football, FNL Youth Football, and AYSO soccer.

# Part-Time Director of Marketing™ Service

## Your Outsourced Marketing Department

Small to mid-size firms may want to hire an experienced, high-level Director of Marketing but cannot afford or justify a full-time person. *The Specialists in CPA Marketing™* provides the answer to this dilemma: high-level expertise at a part-time cost.

On a monthly retainer contract (non-employee) basis, we provide hands-on management and implementation of your marketing objectives, at a fraction of the cost of a full-time employee. This is as an alternative or supplement to an internal marketing department.

We are experienced in all aspects of marketing:

- *Digital Marketing – Websites, Social Media, E-Communication*
- *Branding & Positioning*
- *Business Development – Coaching, Training, Planning*
- *Advertising*
- *Public Relations & Publicity*
- *Brochures & Sales Materials*
- *Proposals / Statements of Qualifications*
- *Event Management and Marketing*
- *Client Relations & Communications*
- *Database Design*
- *Marketing Information Systems*

Our *Part-Time Director of Marketing™* service is provided for a specified fee level each month, allowing stability for your budget. This “use as needed” relationship (versus a full-time employee) provides your firm the flexibility it needs.



# Marketing Planning & Analysis

## **Experience + Expertise = Success**

Utilizing our decades of experience in business management, *The Specialists in CPA Marketing™* are able to provide a high-level of strategic advice across a broad spectrum of management issues. We have always operated on the basis of "A Business Approach to Marketing™". We identify goals upfront, and make sure that there is strategy and business reasoning behind our actions.

Through our unique process, clients are able to be improve the effectiveness of their marketing efforts, while appropriately managing the use of human and financial resources. Our goal is to help you work smarter, not harder.

### **Strategic Marketing Planning**

*Strategy Consultations*

*Strategic Marketing Plans*

*Targeted Marketing Programs*

*Industry or Practice Group Marketing*

*Personal Marketing Plans*

*Marketing Analysis & Recommendations*

### **Marketing Audits**

*Industry & Competitor Analysis*

*Market Assessment Studies*

*Marketing/Sales Organization Analysis*

*Growth & Profitability Consulting*

### **Growth & Profitability Planning**

*Expansion/Downsizing Consulting*

*Diversification Strategies*

*Turnarounds & Restructuring*

*Merger & Acquisition Analysis*

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# Business Development

## **Strategy, Training, Coaching – and more!**

Should more of your personnel become involved in marketing? If so, how can their time and efforts be maximized? Are all your partners carrying their weight? These questions are faced by our clients on a regular basis. *The Specialists in CPA Marketing*™ adds value to this process, offering years of experience in helping clients to maximize individual marketing efforts. Our assistance includes:

### **Rainmaker & Business Development Training**

Do your personnel need to improve their skills in generating new business? If so, *The Specialists in CPA Marketing*™s “Rainmaker & Business Development Training” may be the solution for your firm. We offer numerous workshops on a variety of topics, covering everything your professionals need to know to get started, networking to professional selling skills. These training sessions are provided at your offices.

### **Business Development Meetings**

We can either lead and/or organize your practice development meetings, helping clients to maximize this time commitment.

### **Partner Retreat Facilitator**

Whether as the retreat facilitator (i.e., when it is appropriate to have a third-party lead the retreat) or as an instructor or leader for a certain portion of the retreat, we can help to make your retreat successful.

### **Performance Evaluation & Compensation Systems**

Motivation is a key to any individual's marketing efforts. For many of our clients, this necessitates a revamping of existing performance evaluation and compensation systems. It also requires a careful assessment of firm cultural change issues, and tactful implementation of the program, so as to provide a positive response and enthusiastic acceptance of the new systems.

### **Accountability & Tracking Systems**

We develop systematic approaches to manage your personnel's marketing efforts, helping them to be consistent and more productive.

### **Alignment with Firm Strategy**

We believe that your personnel will be significantly more productive if their marketing efforts are tied in with firm-wide marketing goals and strategies. We work closely with our clients to maximize this crucial interrelationship.

### **Personal Marketing Plans**

CPAs generally have little time available for marketing efforts, so it better be used wisely. Through our unique process, individuals are able to improve the effectiveness of their marketing efforts, while appropriately managing the use of their time and financial resources. Our goal is to help you work smarter, not harder.

### **Individual Coaching Sessions**

We work with you on an individual, personalized basis to improve your success rate in sales calls, targeting prospective clients, presentation skills and branding and positioning.

# Branding & Positioning

## Stand Out from the Crowd!

Do you feel that your firm is “no different from any other firm” in your area of practice? Do you have trouble setting your firm apart from the crowd? A key reason for your problems may be Branding and Positioning!

**Branding** is everything your firm does to communicate its brand in the marketplace.

**Rebranding** is a marketing strategy in which a new name, term, symbol, design, or combination thereof is created for an established brand with the intention of developing a new, differentiated identity in the minds of the marketplace, including clients, prospects, competitors and referral sources, as well as current and future employees. It involves a situation analysis, establishing goals, and a systematic process of creating the new brand to meet these goals.

## How Do We Help You?

Our goal is to develop superb marketing pieces that meet your needs, while limiting the use of your valuable time. Toward that end, *The Specialists in CPA Marketing*<sup>™</sup> makes the process easy: we consult with you on strategy, research and write the content for marketing materials, handle all aspects of design, and handle final production/publishing.

- **Strategy:** *The Specialists in CPA Marketing*<sup>™</sup> makes the process easier for clients through consultations and interviews. We define a client’s unique attributes, assess their target markets, and develop branding and positioning strategies.
- **Internal Communication & Training:** Your personnel need to not only buy-in to your rebranding but be excited about it! *The Specialists in CPA Marketing*<sup>™</sup> can provide training to personnel so that they effectively communicate to clients about your “new brand.”
- **Client Communication:** *The Specialists in CPA Marketing*<sup>™</sup> has the experience you need in knowing how to communicate changes in branding to your clients and contacts.
- **Logos:** We prepare designs based on your company’s culture, desired image and targeted market. A recognizable and professional-looking logo can cause instant recognition. For small to mid-size companies, this image building process is an important part of long-term marketing efforts. Our custom-designed logos are currently being used by numerous firms.
- **Design:** From stationery (electronic and/or print) to marketing collateral pieces (brochures, newsletters, etc.) to advertising, we can design whatever you need. We add tremendous value, gained through developing thousands of pieces, in preparing designs based on your company’s culture, desired image and targeted market.
- **Copywriting:** We research and write materials specifically tailored for either company-wide marketing or practice area marketing. We have written materials for dozens of practice areas and numerous industries and targeted markets.
- **Internet:** Our assistance includes website design, social media, e-newsletters and all other forms of e-communication.



# Digital Marketing

## **Your One-Stop Shop for Internet Marketing!**

Reality check: Are your internet marketing efforts a disjointed mess? If you're honest and the answer is "yes," you're not alone. That's the way it is with most companies. **Exemplar Digital Marketing**, our 100% owned affiliate company, offers a solution to your dilemma: *Integrated Internet Marketing*. Our goal is to bring all of your internet marketing efforts together into a combined, effective and cohesive campaign!

**Exemplar Digital Marketing** provides "integrated internet marketing" services, including:

- *Website development*
- *Website content/copywriting*
- *Branding*
- *Social media*
- *E-communication campaigns*
- *Search engine optimization/search engine marketing*

## **"Integrated Internet Marketing"**

At **Exemplar Digital Marketing**, we use our strategic marketing expertise to develop an "integrated internet marketing" program for your firm, combining and leveraging numerous techniques to maximize your investment. Uniquely, we can develop branding/positioning strategies, write website text, create your logo, design a custom site that represents your firm, market it to the major search engines – and help with other internet techniques, such as e-newsletters, article placement and advertising in on-line directories. We're your one-stop-shop for internet marketing!

## **Key Benefits of Integrated Internet Marketing**

- *One firm handles all internet marketing for you*
- *Strategic planning for a combined synergistic benefit*
- *Tactically handling each detail so that your time is minimized and investment is maximized*
- *Efficient, productive, reduced costs*
- *Clear communication and professionalism*
- *Compelling message*



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# Advertising & Marketing Materials

## **Print/Online Ads, Brochures & Marketing Materials**

*The Specialists in CPA Marketing*™ brings a business perspective to the process of developing advertising programs — we are not interested in designing dazzling advertisements and other marketing materials that fail to bring results. Our clients realize the benefits of advertising and marketing materials designed and implemented by professionals.

Our services include:

- *Brochures*
- *Sales materials*
- *Logos and stationery*
- *Website and social media ad campaigns*
- *E-newsletters*
- *E-Blasts*
- *Announcements*
- *Website posts*
- *Blogs*
- *Display and print ads (magazines, directories, newspapers, etc.)*
- *Radio and TV ads*

## **Copywriting**

We research and write copy for advertisements and marketing materials specifically tailored for either firm-wide marketing or practice area marketing. We have written content for dozens of practice areas and numerous client industries and targeted markets.

## **Graphic Design**

We design a wide range of advertisements and marketing materials for different uses. We add tremendous value, gained through developing thousands of pieces, in preparing designs based on your firm's culture, desired image and targeted market. Whether you want a highly creative or conservative advertisement, we have the capabilities to serve you.

We have developed advertisements and marketing materials for firms of all sizes, focusing on cost-effective campaigns on limited budgets.

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# Publicity & Public Relations

## **Influence Your Market!**

Is it important for the business community in your area to be familiar with your firm and its capabilities? Do you face an image problem that needs to be corrected? Do you want to be perceived as an expert in your field? If the answer to any of these questions is “yes,” then you could benefit from public relations and publicity.

*The Specialists in CPA Marketing™* are highly experienced in designing and implementing successful public relations and publicity programs. Instead of merely increasing the market’s awareness of our clients, we develop programs that influence perceptions, attitudes and comprehension. This approach helps persuade the marketplace to purchase our clients’ services.

Our services include:

### **Event Management**

- Speech Booking
- Seminars and Speeches
- Conferences & Trade Shows
- Client Events

### **Client Relations**

- Client service training
- Communications programs
- Client relationship interviews
- Client satisfaction surveys

### **Media Outlets**

- Internet
- Newspaper and magazines
- Trade publications
- Radio
- Television

### **Media Relations**

- Media kits
- News releases
- Feature articles
- Interviews/quotes
- Publicity-oriented surveys

### **Other Communication Vehicles**

- “Reprint” brochures
- Direct mail
- Video

We believe that the most productive publicity programs are carefully planned, successfully implemented and sustained over time. Our many years of business experience are a crucial element in creating publicity concepts that are interesting and informative to the business community.



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# **The Specialists in CPA Marketing™**

## **Serving Select Clients Nationwide**

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