

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 25 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.



**The Specialists
in CPA Marketing™**

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Business Development Training for CPA Firms

**Continuing Education (CE) courses
for CPAs**



**The Specialists
in CPA Marketing™**

Business Development Training for CPAs

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"* is the solution for your firm!

Professional staff greatly appreciate management's investment in their careers through such courses. As such, this training can help to improve individual BD performance, retain existing staff and attract new personnel.

Our marketing training programs are designed to help meet your Continuing Education (CE) requirements and offer genuine value for CPAs at all levels of experience. As a Qualified CE provider for California-licensed CPAs, our courses follow the provider requirements of the CBA regulations.

Format:

All training sessions are 2 hours in length and are held in-person at your offices. A key advantage of this format, vs. typical CPA society or online training, is being able to discuss specific needs and issues as related to your firm in an open forum. Each session 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 business development concepts. Class size is limited to a maximum of 15, which allows effective discussion and learning.

Cost & Frequency:

Cost for each workshop is \$1,200 (local area only; contact us for out-of-area training). This is an excellent value on a per-attendee basis for 2 hours of in-person CE training. Customized workshops, varying from the descriptions below, are available at additional cost.

To build your BD skills over time, we suggest weekly, monthly, bi-monthly or quarterly training, until all 9 courses below have been completed.

Training Topics:

We suggest that you start with the first course below and proceed in order, however, you may select from any of the topics below:

- 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**

Follow-Up Services:

We often work with partners and managers on a one-on-one basis to improve their BD efforts, including *Personal Marketing Plans* and *Personal Marketing Coaching*. On a firm-wide level, we help with *Business Development Meetings*, *Partner Retreat Faciliator/Presenter*, *Performance Evaluation Systems*, and *Accountability & Tracking*.