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™

Founded 1991

Contact:

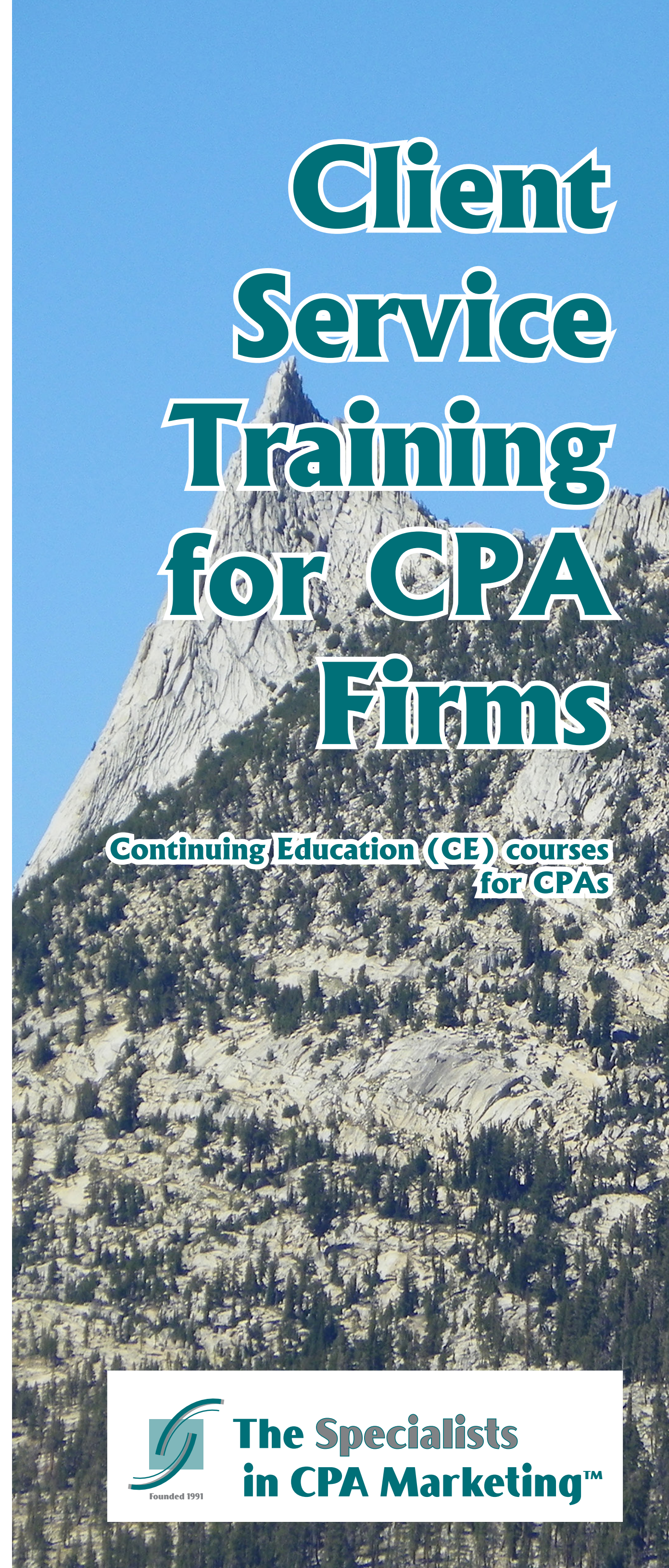
Kevin W. Brown, M.B.A.
President
kb@SpecialistsCPAMarketing..com
www.SpecialistsCPAMarketing.com

Serving Clients:

Throughout California
& Nationwide

Phone: (714) 965-1556

SoCal:
20861 Skimmer Lane, Suite 200
Huntington Beach CA 92646
NorCal:
1275 Peninsula Drive
Lake Almanor, CA 96137



Client Service Training for CPA Firms

Continuing Education (CE) courses for CPAs

The Specialists in CPA Marketing™

Founded 1991

Client Service Training for CPA Firms

Through these series of workshops by ***The Specialists in CPA Marketing™***, 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.

Professional and admin staff greatly appreciate management's investment in their careers through such courses. As such, this training can help to improve individual 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 and admin staff to learn and apply key client service 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.

We suggest weekly, monthly, bi-monthly or quarterly training, until all 4 courses below have been completed.

Training Topics:

The Specialists in CPA Marketing™ offers numerous course options. 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. 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.

Follow-Up Services:

We often consult with partners and managers on specific client situations. On a firm-wide level, we help with *Communications Programs (e.g., eblasts, newsletters, alerts, website, social media, etc.), Client Relationship Interviews,* and *Client Satisfaction Surveys.*