



**CAPSTONE**  
COMMUNITY

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A Community for Accounting Firm Managing Partners

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Benefit from the Collective Strength of the Capstone Community  
Facilitated by Jean Caragher, Capstone Marketing



# WELCOME

As an accounting firm managing partner you face many challenges. Obtaining new clients. Retaining current clients. Attracting the best and the brightest. Increased competition. Keeping up with technology. Identifying your successor. And more.

This is why I formed the Capstone Community, to provide a forum for education and collaboration about CPA firm growth and client retention. You will benefit from the collective strength of your Capstone Community. And, to foster accountability and execution, you are encouraged to participate with another member of your firm.

## **Benefits of Membership:**

- Limited to 10 firms of similar size
- Members are geographically exclusive
- Peer Capstone Community members
- Monthly group online meetings
- Monthly individual coaching calls
- 24/7 access to the Capstone Community Library
  - o Templates
  - o Checklists
  - o Videos
  - o Monthly group meeting videos
  - o Capstone Marketing eBooks
  - o Recommended reading
- A complimentary copy of The 90-Day Marketing Plan for CPA Firms: How to Create the Roadmap for Your Firm's Growth

Review the program. Call me at 727.210.7306 with questions or your decision to join. I look forward to welcoming you into the Capstone Community.

**Sincerely,**

**Jean Caragher**  
**Founder, Capstone Community**  
**President, Capstone Marketing**

# PROGRAM

## Setting Yourself Up for Success

### Goals:

- Client Base Analysis – How to
  - By NAIC
  - Service
- Impact on marketing program
- What successful firms are doing

### Homework:

- Conduct Client Base Analysis
- Collect Email Addresses and other information for personalization

### Capstone Community Resources:

- NAIC Listing/URL

## Create Your Firm's Marketing Plan and Budget

### Goals:

- How to create a marketing plan
- Components
- Research
- Goal setting
- How to create your firm's marketing budget
- How much are firms investing in marketing?
- How are firms investing their marketing dollars?

### Homework:

- Begin the 90-Day Marketing Process
- Create marketing budget

### Capstone Community Resources:

- A complimentary copy of The 90-Day Marketing Plan for CPA Firms: How to Create the Roadmap for Your Firm's Growth
- Marketing budget template

## Niche Marketing

### Goals:

- Defining a niche marketing strategy
- Review examples of successful niches

### Homework:

- Determine potential niches

### Capstone Community Resources:

- Niche marketing checklist

## Build/Work Your Referral Network and Small-Scale Mixers

### Goals:

- Firm "networking readiness" assessment overview
- Networking skills training
- How to determine the organizations to join
- How to ask referral sources for leads
- The role of mixers in your marketing strategy
- Business etiquette tips
- Crafting your introduction

### Homework:

- Complete networking readiness assessment
- Set firm networking goals and assign accountability
- Conduct referral meetings
- Monitor implementation
- Identify mixer candidates
- Arrange one mixer

### Capstone Community Resources:

- Networking Readiness Assessment
- Networking skills PDF
- How to ask for leads process
- Mixer template and tips
- Etiquette PPT
- Guide to how to create your introduction
- Follow up tips



## The Wide, Wide World of Websites and Getting Found Online

### Goals:

- Understanding the ROI of websites
- Determining what the next step for improvement should be for your site to deliver value to your firm
- Google maps
- Search engines

### Homework:

- Conduct website audit
- Create “update” plan and assign responsibilities
- Update website to get found online

### Capstone Community Resources:

- List of website vendors
- Website audit
- “Update” plan template
- Guide to Getting Found Online

## Personal Branding

### Goals:

- LinkedIn Profile
- Website Bio
- Specialties

### Homework:

- Update/create social media profiles for key partners
- Deploy thought leadership messaging through social networks

### Capstone Community Resources:

- PowerPoint video resources to train internal teams



## Prepare for Tax Season

### Goals:

- Client Acceptance Criteria
- Onboarding New Clients
- Public Speaking

### Homework:

- Establish client acceptance criteria
- Identify speaking opportunities

### Capstone Community Resources:

- Client acceptance criteria checklist
- Letter to send to organizations regarding speeches
- Public speaking tips
- PPT slides including best practices
- List of vendors that sell programs

## Tax Season Marketing Ideas

### Goals:

- Cross-Selling
- How to Ask Clients for Leads

### Homework:

- Complete Cross-Selling Checklist
- Team Meeting on Asking for Referrals/Role Playing

### Capstone Community Resources:

- Cross-Selling Checklist
- Talking Points for Asking for Referrals

## Client Satisfaction & Retention and Client Evaluation – Who to Fire?

### Goals:

- How client satisfaction and retention fit into your marketing strategy
- Learn how to use the Client Evaluation Template to drive action

### Homework:

- Conduct a Client Satisfaction Survey
- Assemble your team
- Complete Client Evaluation Template
- Client Evaluation Review

### Capstone Community Resources:

- Client survey template
- Published articles
- Follow up tips
- Script to discuss fee increase
- Script to discuss client transition
- Letter regarding fee increase
- Letter regarding client transition
- Articles
- Other Resources

## Enewsletters, Client Communications, and Content Marketing

### Goals:

- Understand the strategic value of targeted communications and proactive ideas
- Enewsletters
- Social Media
- Inbound Marketing

### Homework:

- Internal audit of Client Communication Process
- Complete Social Media Plan
- Assemble team and assign responsibilities

### Capstone Community Resources:

- Enewsletter best practices
- List of enewsletter and content vendors
- Internal audit checklist
- Social Media Plan template

## Technology: Apps and Tools to Increase Efficiency and Productivity

### Goals:

- Share tools and apps

### Homework:

- Evaluate options to upgrade your technology

### Capstone Community Resources:

- List of tech tools
- List of paperless vendors



## Get Your Team Focused on Firm Growth

### Goals:

- Personal marketing plans
- Expectations
- Training

### Homework:

- Identify marketers
- Confirm expectations
- Start completing personal marketing plans

### Capstone Community Resources:

- Personal marketing plan template
- Guide to expectations by level
- List of training options

## Program Wrap-Up: Best Practices Learned

### Goals:

- Execution

### Homework:

- Identify challenges to execution
- Reset expectations of team members
- Revise evaluation process

### Capstone Community Resources:

- Tips for successful execution

## Frequently Asked Questions

1. Is it required to have someone participate with me?

Yes. Studies – and human nature – show execution and accountability increase when working as a team. You will derive greater benefit from participating with a team member, e.g., fellow partner, manager, firm administrator or marketing professional.

2. What if I miss a group webinar?

To optimize your investment, we encourage attending all sessions. However, managing partner schedules are complex and demanding. All group webinars will be recorded for your viewing on demand. Additionally, we will arrange targeted follow-up interactions with key members of the group where collaboration will add value to both firms. Our goal is to make this program integrate into your schedule as best as possible.

3. What if I miss a coaching call?

Similar to the group webinars we realize there may be times when a private coaching call will need to be rescheduled. Every effort will be made to reschedule calls with respect for each person's availability and convenience.

4. Will the Capstone Community members know each other or is membership confidential?

One of the benefits of Capstone Community membership is your peer group. Members will know each other and are encouraged to share ideas during and after the programs.

5. How do I join a Capstone Community?

To join a Capstone Community go to <http://go.capstonemarketing.com/capstone-community-2017> or call Jean Caragher at 727.210.7306.

# MEET JEAN CARAGHER



Jean Caragher gets things done. For CPA firms seeking to improve their marketing, Jean is the go-to resource for strategy and implementation. With 30 years of experience working solely with CPAs, Jean knows the challenges and opportunities firms face today. Her experience and knowledge, combined with her practical approach, help growth-focused CPA firms attract the best clients and talent. A well-respected industry specialist, Jean is an inaugural AAM Hall of Fame inductee, a multiple AAM-MAA award winner, and a CPA Practice Advisor Thought Leader.

Prior to launching Capstone Marketing in 1998, Jean served as a CPA firm marketing director and association executive director. She has twice been named one of Accounting Today's 100 Most Influential People in Accounting.

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## **Books/Published Articles**

- Author, The 90-Day Marketing Plan for CPA Firms: How to Create the Roadmap for Your Firm's Growth
- Author, Double Digit Growth: Tools From Top Firms
- Contributing Author, How to Hire a Marketing Director and Make It Work
- Contributing Author, The Marketing Advantage II: New Ideas on Getting and Keeping Clients
- Contributing Author, Bull's-Eye! The Ultimate How-To Marketing and Sales Guide for CPAs

Jean has written or been quoted in hundreds of articles on professional services marketing appearing in Journal of Accountancy, Accounting Today, The CPA Insider, The CPA Journal, The Practical Accountant, CPA Practice Management Forum, Bowman's Accounting Report, CPA Marketing Report, Professional Marketing, Growth Strategies, MarkeTrends, Partner-to-Partner Advisory, and other publications.

## **Speeches/Training Programs**

Jean is a popular and well-known speaker and has made presentations for the AICPA; Association for Accounting Marketing; PDI Global; Association of Accounting Administrators; American Women's Society of CPAs; and, many accounting firm associations and state societies. Jean also conducts a variety of marketing training programs for CPA firm partners and staff.

## **Honors/Awards**

- Inaugural member, Association for Accounting Marketing Hall of Fame, 2001
- Association for Accounting Marketing-Marketing Achievement Awards
  - Corporate Identity Package (Firms Under \$15 Million Revenue), 2005, 2011
  - Logo Redesign (Firms Under \$15 Million Revenue), 2001, 2005, 2011
  - Brochure (Firms Under 75 Professionals), 2001, 2012
- "100 Most Influential People in Accounting," Accounting Today, 1993, 2013
- "Top 25 Thought Leader in Public Accounting," CPA Practice Advisor, 2015, 2016, 2017