

# Jean Marie Caragher, MBA

Accounting Marketing Consultant – Speaker – Author - Advocate

Whether your goal is to provide your members with the tools to grow their firms or retain current clients, Jean will use her practical, customized and interactive approach to set them on the path to performance.



## As seen at ...

AICPA Practitioners Symposium  
and TECH+ Conference



... just to name a few.



## SAMPLE PRESENTATIONS

### How Technology is Changing How CPAs Generate Leads

Outbound marketing is how CPAs seek out prospects through more traditional marketing methods like seminars, trade shows, direct mail, and print advertising. Inbound marketing, often referred to as content marketing, is how prospects find you through blogging; search engine optimization; eBooks and whitepapers; Twitter; LinkedIn discussions, groups and posted articles; blog comments; and, videos and slide decks posted online (YouTube, SlideShare). Is one strategy better than the other? This session explains how to combine outbound and inbound marketing tactics to generate new business for your CPA firm.

### Create Your CPA Firm Marketing Plan in Just 90 Days

A firm marketing plan is no longer a “nice to have” – it’s a “must have.” The most successful CPA firms - large, small and in between - are *14 times* more likely to work from a written marketing plan. This session will map out a week-by-week plan to create a firm or niche marketing plan. Using exclusive, proven, data-driven methodologies, attendees will identify and analyze the most effective habits of high-performing firms and focus on the techniques most likely to achieve success at their firm. Based on Jean’s book, *The 90-Day Marketing Plan for CPA Firms: How to Create the Roadmap for Your Firm’s Growth*.

Contact Jean Today! 727.210.7306

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For Jean’s complete list of presentations go to  
[www.capstonemarketing.com/speaking-engagements/](http://www.capstonemarketing.com/speaking-engagements/)

## What they're saying ...

"Jean tells it like it is."

"Best presentation so far."

"Very professional and knows her stuff."

"Jean did a great job of presenting the material and customizing the presentation in response to questions."

"Your energy level and expertise contributed to a successful meeting ... We appreciate your professionalism ..."

"Jean, as always, is effective, entertaining, while bringing good processes to the marketers in her audience."

"Presenter's enthusiasm for the industry, subject matter, eagerness to convey experience and knowledge."

"She did a great job interacting with the attendees."

"Jean was effective as usual! I had high expectations for this session and I was not disappointed!"

"Excellent information and resources!!"

**Contact Jean  
Today!**

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## SAMPLE PRESENTATIONS

### Client Retention Strategies Every Firm Can Use

For the first time in years client retention is a top MAP issue. In fact, poor client service and inattentiveness is the #1 reason why clients switch CPA firms. This session will reveal how clients choose, why clients change CPA firms, and practical initiatives that you can execute to contribute towards your firm's client retention.

### The Truth Behind Winning Brands

Jeff Bezos, founder of Amazon.com, defines a brand as "what people say about you when you're not in the room." Many CPAs are beginning to understand the importance of these conversations by creating brands for their firms. Branding is more than a logo. A strong brand lets clients know what they can expect of the complete range of products/services that a CPA firm offers. A winning brand can distinguish your firm from its competition, increase your firm's visibility in the marketplace, help you deliver more consistent messages to clients, contacts and staff, and give your recruiting efforts a boost.

### ABOUT JEAN CARAGHER

Jean Marie Caragher is an award-winning, recognized industry expert with nearly 30 years accounting marketing experience. Known as a knowledgeable, experienced, and tenacious marketing consultant to CPA firms Jean inspires CPA firm growth and longevity using a practical, relationship-based approach. Her approach is based upon her experiences as a CPA firm marketing director, a CPA association executive director, and her 17 years of consulting experience since forming Capstone Marketing. Jean is a founder of the Association for Accounting Marketing (AAM), an inaugural AAM Hall of Fame inductee, a multiple AAM-MAA award winner, one of *CPA Practice Advisor's* 2015 Top 25 Thought Leaders, and has twice been named one of *Accounting Today's* 100 Most Influential People in Accounting.

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