

Jean Marie Caragher

Marketing Consultant to Accounting Firms | Strategy | Collaboration | Execution

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.



CAPSTONE MARKETING

As seen at ...



AICPA Practitioners Symposium
and TECH+ Conference



... just to name a few.

SAMPLE PRESENTATIONS

Gear Up for Growth: Lessons from High Performing Firms

High performing accounting firms are excelling in marketing culture, marketing goal achievement, marketing plan development, and more according to **Gear Up for Growth: The NEW Marketing Trends Manual for Accountants**. High performing firms are doing many things right, which makes them more competitive. Low performing firms have the opportunity to learn from the best in class firms. In an age of strong competition and a fight for clients and staff, accountants can benefit from the practical information shared in this session to advance their firm's marketing programs using the lessons of high performing accounting firms.

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

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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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.

Client Retention Strategies Every Firm Can Use

According to the *PCPS CPA Firm Top Issues Surveys* client retention hasn't ranked among the top five issues since 2013. This is dangerous considering 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 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.

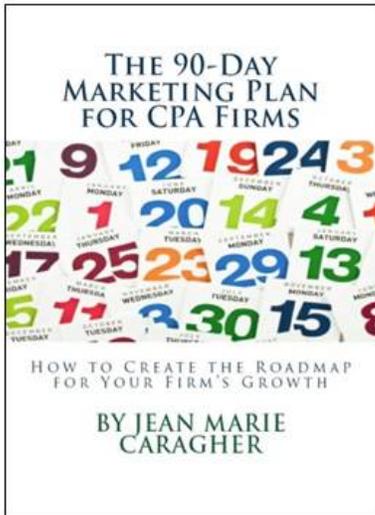
How to Find Your Business Development 'Sweet Spot'

With average organic growth rates at 0 – 3% and competition increasing, it's important to have as many of your team members involved in business development as possible in order for your business to experience growth. Yet, when faced with creating and implementing a firm marketing plan, most CPAs don't know where to begin, have misconceptions about marketing tools or avoid involvement altogether. This program will help you identify your marketing "sweet spot" — the marketing activity with the biggest return for you. We will cover: Marketing tools; Best practices; Networking; Client Service; Writing; Public Speaking; Social Media; and, more!

Building Relationships and Referrals Through Networking: Online and the Real World

Networking continues to be a top lead generation strategy for CPA firms. In fact, according to *Gear Up for Growth*, networking with prospects and referral sources is one of the top four marketing activities firms of every size plan to increase. This is particularly important since "referrals from peers, friends or family" is the top tool millennial business owners use to find accounting services.

The ideas don't stop here! This is just a sample of topics Jean can present to your organization. [Contact her](#) if you have another topic in mind.



Rave reviews for Jean's book, *The 90-Day Marketing Plan for CPA Firms*

Excellent guide ... A host of sound advice..

- Accounting Today

Her book is a 'must read' for firms serious about growth.

- Allan D. Koltin, CEO, Koltin Consulting Group

I love it! I've added it to the recommended reading list for our leadership academy.

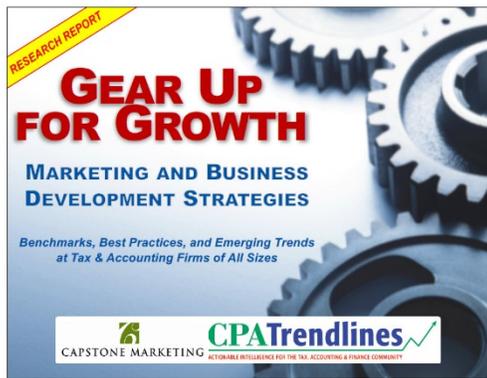
- Sandra Wiley, COO & Shareholder, Boomer Consulting

Follow the process, and your firm will be on the fast path to growth. Brilliant and right on point!

- Jack Kolmansberger, CMO, Herbein + Company

Connects the WHY with the HOW and the WHEN.

- Sally Glick, CMO, Sobel & Co.



Rave reviews for Jean's webinar related to *Gear Up for Growth*

Good information that I can use immediately.

Good pace. Not too much content to be overwhelming. Nice job!

Helpful and cutting-edge information.

Timely, relevant information. Give it a 10 rating.

Rate it a 10 out of 10.

ABOUT 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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