



## CAPSTONE MARKETING

### Jean Marie Caragher

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#### Professional Experience

Jean Caragher gets things done. For CPA firms seeking to improve their marketing, Jean is the go-to resource for strategy and implementation. With over 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. Jean is a Certified HubSpot Partner, and a Certified Instructor of Advanced Pricing Methods®.

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.

#### Books/Published Articles

Lead Author, *Gear Up for Growth: The Marketing Trends Manual for Accountants*  
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*, *Seasonality Success*, *The Practical Accountant*, *CPA Practice Management Forum*, *Bowman's Accounting Report*, *CPA Marketing Report*, *Professional Marketing*, *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-  
Volunteer of the Year, Association for Accounting Marketing, 1999  
Member, Editorial Advisory Board, *CPA Marketing Report*, 1995 - 2005  
Member, Practice Management Editorial Advisory Board, *Accounting Today*, 1993-2003

#### Organizational Involvement

Association for Accounting Marketing, Member  
National Speakers Association, Member  
Leukemia & Lymphoma Society North Florida Chapter, Advocate and Volunteer

#### Education

B.A. degree in Communication Studies, S.U.N.Y. at Oswego  
M.B.A. degree in Marketing, Hofstra University