

# Our Process To Help CPA Firms Quickly Get a Plan In Place

## Marketing Roadmap



Our Roadmap accommodates the CPA firm profession exclusively. Visionary will quickly create a marketing plan that minimizes Partner, Shareholder and key professional's time. It addresses opportunities and challenges professional accountants encounter, and creates a written plan that lays out the order and timeframe of the steps we recommend.

The Roadmap includes a written survey we ask all professionals to complete, individual phone interviews with select personnel, a review of your website and literature, as well as other supporting materials you feel are appropriate. Your time investment is approximately fifteen minutes to complete the written survey, an hour for a phone interview, and an hour to review the final Roadmap we produce. The timetable to create a Roadmap is two weeks or less once we get the phone interviews scheduled.

Why Visionary versus a local marketing firm? We are one of the few marketing organizations created exclusively to support CPA firms. We understand what a 5500 and 990 are, and how to use them in our efforts. Our firm owns databases specific to CPA firm needs, and has the knowledge how to use them, and apply them to your firm. We have in-house executive callers to communicate with targeted CFO's, Controllers and Executive Directors. We understand what is needed, can show you what needs to be done, and then we do it for you. The Roadmap tells us where to start and how to proceed.

For additional information please contact Visionary Marketing  
800.995.9186 or via email at [info@thinkvisionary.com](mailto:info@thinkvisionary.com).



## 100% Satisfaction Guaranteed

Our Marketing Roadmap is a 100% risk free offer. There is fee, but we do not ask for a retainer or any money throughout the process. If you are unhappy with the results or just do not feel like paying, you are not obligated to do so. You keep the Roadmap and we walk away.

We are very confident in our ability to support any CPA firm. If we cannot get through the Roadmap, then we do not want the firm as a client, and are willing to absorb the time and expense to learn this early in our relationship. This is our "offer". Does your firm have an offer?



Exclusively  
Focused On  
The Accounting  
Profession

**VISIONARY**  
MARKETING

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[ThinkVisionary.com](http://ThinkVisionary.com)