

# Helping Partners Create An Organized Marketing Effort

**VISIONARY**  
M A R K E T I N G

Marketing Direction  
Lead Generation  
Niche Development  
Websites & Literature



Exclusively  
Focused On  
The Accounting  
Profession

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# Focused Support To Get Your Firm Building a Pipeline of Leads

## Marketing Director Role



At a certain size many firms need to make a decision. Do they bring in a dedicated person to manage their marketing and new business generation efforts? Do they continue to rely on referrals? Are they comfortable? Here are signs that tell you an experienced, dedicated marketing professional is needed:

1. You keep losing to a competitor who does not provide the quality you offer.
2. Even at a lower fee, you lose engagements to peer firms your size.
3. Competitors seem to get more opportunities with the “next tier” of clients.
4. Beyond a purchased newsletter, you do no marketing.
5. Recruiting is getting harder.

Hiring a Marketing Director is a significant decision. For many firms it’s a new investment. It’s also an area many firms do not know how to determine the credentials of a potential candidate, so they hire based on personalities, and work experience in other industries.

With Visionary you get a marketing department with intimate knowledge of the CPA firm profession. We come complete with experienced personnel, databases, proven lead generation programs, and the ability to counsel Partners, create a website and develop firm literature. And, we do this at less than the cost of hiring a marketing assistant.

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## Have You Been “Burned” In The Past?

Unfortunately, some lead generation ideas do not work, and firms can hire the wrong marketing executive. For example, a firm hires a successful financial services executive as their Marketing Director, but that person has limited knowledge of CPA firm operations. On the surface it seemed like a good fit, but CPA firm marketing is a very different skill set.

Creating a plan, and developing business requires a person experienced with the accounting profession. At Visionary, we become the Marketing Director for firms that have not found the right marketing leader, or do not need a full-time professional for their firm.



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# 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.

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## 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?



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# Executive Calling & Mailing Programs Into Select Groups Of Targets

## Nurture Marketing



Nurture marketing targets and communicates with key prospects. For example, if you have defined a \$5M to \$10M industry group as the ideal prospects to win, and there are 1,000 targets in this group in your area, how do you reach them all? It's too time consuming and expensive to personally communicate with all 1,000 prospects. Instead, develop a nurture marketing program that touches them quarterly, and segments the type of touch each prospect receives.

A typical nurture program starts by deciding the best prospects to target. Using the 1,000 group example above, assume you want to mail all prospects quarterly, but the budget to call is limited to 300 prospects. In month one, we would mail and call the first 100. Typically, we call three times, and leave two voicemails. In month two, we mail and call the next 100. In month three, we communicate with the final 100. In month four, we start the process over with the first 100.

Using this approach, prospects get four letters per year and up to eight voicemails spread out over four quarters. This increases your firm's awareness in the marketplace, and presents the opportunity to "be there" when a prospect decides to make a change. Mailing everyone quarterly is a wise addition, if your budget can support it, but the executive calling generates the majority of the leads. The key to marketing a nurture program is not to script calls. Instead we engage the targeted executive in a conversation, and get them to agree to accept a call from a Partner in your firm.

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## Frequent Touches Create Leads

There are four reasons prospects switch CPA firms. Poor service is the number one reason a prospect changes. The second is a relationship break. The client's primary contact at the firm is switched or the client brings in a new executive as your firm's primary contact. The third is regulatory changes. A new rule, or the board of director's policy, requires rotating firms. The final reason is fees. Fees typically are not the reason change occurs.

Each call made and letter sent touches a prospect and establishes a presence that creates opportunities.



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# Targeted Lead Generation With Select Non-Profits

## Non-Profit Prospecting



Many firms have deep non-profit niches, while some firms avoid non-profits because engagements may be heavily discounted. The return on your non-profit audit practice can be dictated by the size of the non-profits being targeting and their fiscal year end. Keep in mind even at discounted rates some engagements can fill a void in your audit schedule, which still adds to the bottom line.

The common mistakes many firms make with their non-profits are:

1. No target segregation. All non-profits are not great fits.
2. Targeting too low. If your target is a \$750,000 non-profit, expect a fee battle because small firms will bid low. To get better fees, target better non-profits who also look at the risk factor of hiring a small firm, and not just assess each bid on fees.
3. Trying to win every piece of business. If a prospect sends an RFP and will not make time to talk with you before responding, is that a serious prospect?

We walk you through the target selection process, build a rich non-profit database, write the letters, and call the Executive Director or financial executive. Our approach includes targeting by size of the non-profit, fiscal year end, and current auditor when available. We build a pipeline of leads, and walk you through the leads as they surface and send our Partner Report that tracks leads and activities so we can take appropriate follow-up actions.

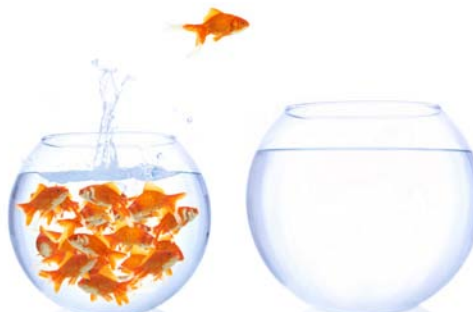
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## Why Do Non-Profits Switch Firms?

Just like private companies, non-profits experience service problems, relationship changes, and fee concerns. There are two main differences between non-profits and private companies. The first is the RFP process. Even a satisfied client may be forced to go to bid. The second is volatility. There is a much higher turnover rate of executives in charge of non-profits entities. A new Executive Director brings change with him or her. In a larger non-profit, a new financial executive or board member enters the picture and they may force change.

The “volatility factor” creates a great marketing opportunity for firms. This is an area you market to all year long.



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# A Custom, Specific Process Targeting 5500 Filers To Win EBP Audits

## Employee Benefit Plan Audits



A long time ago we had a client who built their entire practice around EBP auditing. They taught us the background of EBP auditing and asked us to develop a method to “hunt” for these audits. Their practice was acquired in an exit strategy, but since then Visionary has been conducting EBP audit engagements for firms across the country.

The best time to seek EBP engagements is January to May. Since benefit plan audits have a 7/15 initial filing deadline, and a 10/15 extension, organizations defer the decision to select an auditor until after 12/31 responsibilities have passed. While your firm is busy with tax returns and financial statement audits, prospects are busy seeking new EBP auditors. By May, many prospects will have signed engagement letters, or are already talking to a short-list of firms.

Prospects switch plan auditors for a variety of reasons. Fees are a factor, but the main reason EBP auditors are replaced is poor service. Many firms treat the EBP audit as a secondary area and send inexperienced staff each year. When the client starts “training” the EBP auditor, or adjusting their schedule to accommodate the auditor’s needs, they become open to change.

We can tell you how many EBP audit opportunities exist in your area, as well as the number and size of plans, and the current auditor. This level of information enables us to selectively target prospects that best fit your firm’s profile. We help you understand which prospects may be the best targets based on the depth of your current EBP audit practice.

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## How To Start An EBP Program

Decide who to target, pull the database, and write a letter by mid-December. Prepare to drop the letter in January to February, and then start calling prospects. We suggest focusing on targets you can win. As an example, pursuing a 1,000 participant audit when your largest plan has 250 employees is typically not a good strategy.

Visionary can handle all of this for your firm, including lead management. Once a lead is generated we handle all communications, send literature, and get a prospect ready to accept a phone call from a Partner in your firm.



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# Public Company 10q and 10k Engagements

## SEC Marketing



Visionary has a lead generation program for CPA firms seeking public company audit opportunities. Our staff is familiar with the regulatory requirements public companies face, and is experienced in executive level calling. We create opportunities for your firm to talk with the financial executive of a publicly traded company you have targeted. Our efforts include:

1. Building a detailed list of public company targets.
2. Competitive intelligence.
3. Mailing communications to targeted prospects.
4. Executive calling into targeted prospects.
5. Sending firm literature to interested prospects.
6. Following-up on open leads.
7. Monthly reporting of activities and a review of generated leads.

The goal is to increase your firm's awareness and create a pipeline of new prospect opportunities. We do not set appointments for you. Instead, we get the CFO or Controller ready to accept a phone call from your SEC Practice Group Partner. This is a complex, relationship sell that often takes time to nurture and mature. We provide a turnkey service and advice to help you expand your public company portfolio.

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## Is This An Emerging Practice Area?

PCAOB registered firms can struggle with building their public company client base. The timing when to switch is not always as simple as in privately held or non-profit entities. There are investor concerns to address. Will a change indicate financial difficulties? Could it demonstrate to investors that management was unable to work with their accounting firm?

Timing can be different for each entity. The opportunity to begin conversations can occur at any time of the year, but the actual timing of the engagement may be deferred or accelerated based on each individual client. This is an area you market to all year long.



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# Professional Designs & Customized Content To Keep Prospects Interested

## Web & Literature



The function of a website or literature is to pass a prospect's quality test. Your website and literature may be the only items they have to initially evaluate your firm. If they do not think your firm has the quality, or is perceived as the type of firm they feel is at their level, then you may never get the chance to have the conversation that sells them on you.

This is a relationship business. A prospect or referral source needs to be sold on you because ultimately they make the decision to buy based on perceived quality, personalities, risk factors, and fees. A poor website, or lower quality literature, can send a prospect signals that your firm may not be of the caliber they prefer. It can kill the opportunity to have the next contact

There are three key factors to evaluate when hiring a web designer:

1. Their ideas on the navigation system. This is the nucleus of any website. A poorly laid out navigation system will lose a reader quickly.
2. Will they be providing content? Who is going to write the content?
3. Fees. Don't be sold on the design or a low fee only. If you are responsible for writing content expect the project to get significantly delayed.

With Visionary, you get developers who think through the site, can write the content, and provide a nice look. We apply the same approach to our literature designs.

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## Keep It Simple & Clean

Do not over think content. People need to be led to your strong points. Including too much information will make a reader work too hard and cause them to lose interest. A site needs to be attractive, but easy on the eyes. A mistake many CPA firms make with their web efforts is having so much information on the main page that a reader has to figure out where you want them to go.

Your website should lead the reader. Do not give them so many options that they miss the highlights. Walk them through your site by keeping it simple, clean and offering fewer choices so they stay on your path.



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