

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.

For additional information please contact Visionary Marketing
800.995.9186 or via email at info@thinkvisionary.com.



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.



Exclusively
Focused On
The Accounting
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