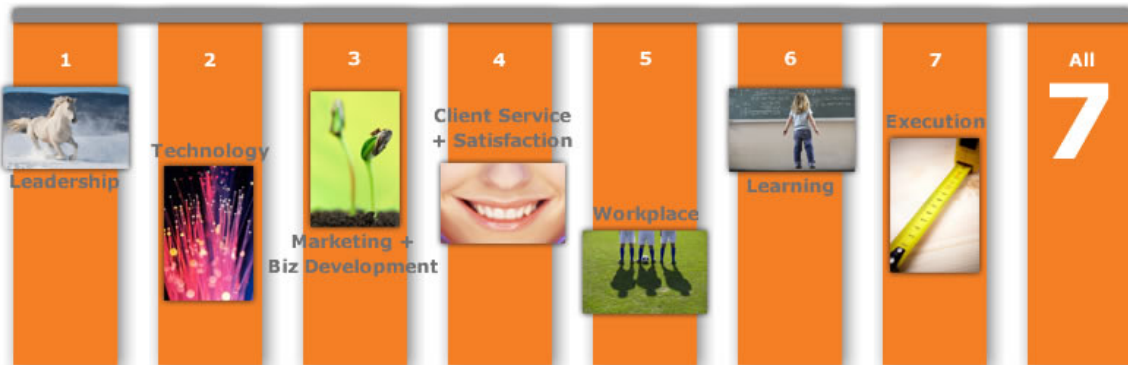


SevenKeys

to Successful CPA
Firm Management



**LIVE ONLINE WORKSHOP:
Build Your Accounting Firm's Strategic Plan**

**Seven Keys to Successful CPA Firm Management
Presents**

The Two-Hour Strategic Planning Session for Your Firm

Learn from the SevenKeys Leaders. Discover how they become *19 times* more likely to produce superior revenue growth. This interactive confidential workshop will help you:

- **Prioritize strategies.**
- **Budget investments.**
- **Diagnose client satisfaction issues.**
 - **Discover new marketing ideas.**
 - **Attract and retain the best talent.**
- **Position your firm for growth and success.**
- **Walk away with the checklist you need for your year ahead.**

Using exclusive self-assessment tools, we'll help you focus on what your firm really needs, the areas that will really leverage success, cut through the unwieldy to-do lists of firm management and concentrate on the handful of strategies that your firm really needs.

OUR NO-RISK GUARANTEE:
If you aren't 100% satisfied
that you've received full value
for the fee you've paid,
just tell us within 21 days
after the webinar and
we'll send you a complete refund.
You have NOTHING to lose
and EVERYTHING to gain.
This session could change
the way you do business.

Join the live online workshop webinar, get the study materials and the Seven Keys CPA strategic planning workbook.

A significant value!
You could get all seven of our
introductory webinars for \$623.
(And we recommend it.)
Or, you could join this
***advanced* online workshop**
and start working
on your annual strategic plan
immediately.

This is your opportunity to learn the secrets of success from the profession's best performing firms, select the strategies most applicable to your firm, and put them to use immediately.

PLUS:

**Get one-half hour of
FREE personal and confidential
follow-up consulting
to get the most
out of your workshop session.**

*(It's just one way
we guarantee this online workshop
will change your firm for the better.
Or your money back.)*

What you get:

1. The two-hour online workshop.
2. Study materials and handouts.
3. The Seven Keys CPA Self-Assessment and Strategic Planning Toolkit and Workbook.
4. FREE consulting.
5. *AND... Your own promo code for 20% OFF on your next Seven Keys CPA purchase. (Expires 12/31/2011.) Use it to go deeper into the Seven Keys to Successful CPA Firm Management program.*

**NOTE: This is a *workshop*, not a lecture.
Participants are advised
to be prepared
to take notes,
to evaluate their own firm's performance,
and to take action.**

What you'll learn...

KEY #1: LEADERSHIP

1. Analyze how your firm's leadership compares to the best in the business.
2. Learn the five essential qualities for accounting firm leaders.
3. Measure your firm's guiding values, vision and mission and discover how to drive growth with the right mix for your firm.
4. Discover the secret of the \$10,000 billable hour.
5. Hear from one of the profession's leading managing partners on his "Four New Essentials for CPA Leaders."
6. Get the keys to maximizing employee loyalty and productivity in difficult times.
7. Compare your firm's habits and behaviors with the strategies deployed by the best firms in the business.
8. Assess your firm's partner accountability systems and learn the right methods for your firm's situation.

KEY #2: TECHNOLOGY

1. Do you know how the best firms use technology to create value?
2. We'll reveal the technology investment and implementation trends that mean the difference between leaping ahead and falling behind. (Surprise: It's not about how much you spend.)
3. How a simple work-in-process monitoring system can double your chances to beat the competition.
4. How to achieve the measurable increases in productivity year after year that only leading firms have mastered.
5. Determine if your firm really needs to be an "early adopter" of new technologies. (And what that means.)
6. Learn the step-by-step system for creating a technology budget that makes sense.
7. Discover the no-brainer rules for tech training that so many other firms overlook.

KEY #3: MARKETING AND BUSINESS DEVELOPMENT

1. Did you know that leaders are 23 times more likely than laggards to be satisfied with their firm's marketing? We'll show how they do it.
2. We'll reveal the latest trends in marketing strategies and spending that you can use to benchmark your firm's performance.
3. Learn what leading firms know about marketing strategy that laggards don't — and the single easiest step you can take toward success in business development.
4. Analyze the key elements of a marketing plan for your firm.
5. The five easy-to-remember essentials for achieving your firm's revenue goals.
6. We'll provide the professional templates you need to hit the ground running.
7. Get the 21-point budgeting plan for your firm's marketing programs.
8. Rate your firm against peers in niche and specialty services.
9. Learn how to analyze and upgrade your client base — potentially increasing your competitiveness by three-fold.
10. What leaders know about developing new business opportunities that laggards don't.
11. Determine what you need to do now: Build a better website? Launch an electronic newsletter?

KEY #4: CLIENT SERVICE AND SATISFACTION

1. Do you know how the best firms retain clients and grow revenues?
2. How a 5% improvement in client retention can improve profits 25% to 85%?
3. Why clients want you to succeed and how you can make you don't disappoint.
4. Do you know what clients REALLY want? (In fact: most CPAs don't and we can prove it.)
5. Why clients love the "one-firm" rule.
6. Who's the most important person in your firm to clients.
7. When's the best time to ask for a referral. And get it.
8. Key elements of a client satisfaction program.

KEY #5: CREATING A GREAT PLACE TO WORK

1. What the Seven Key Leaders know about mentoring that Laggards don't.
2. Why mentoring isn't coaching.
3. Rewards and recognition for new business development.
4. Work-Life Balance: Not just buzz words.
5. The five can't-miss rules for performance reviews that produce results.
6. When to start a leadership development program.
7. Why your best staffers are worth individualized career guidance. (No, they won't jump ship.)
8. How lousy teamwork impacts the bottom line.
9. The secret to fair and competitive compensation levels.

KEY #6: BUILDING THE LEARNING ORGANIZATION

1. Continuous, life-long, firm-wide learning strategies.
2. How it creates an agile and adaptable firm capable of competing in a changing world.
3. How to align CPE schedules with business strategy.
4. How to mesh staffers' personal goals with the firm's goals. (And why it works for staff retention.)
5. Who benefits most from getting the training they want.
6. Who decides the kind of training people need.
7. How "the learning organization" acts as a risk-management tool.
8. When malpractice liability matters in CPE.
9. How much do firms really spend on CPE?
10. Where's the biggest ROI bang for the buck?

KEY #7: STRATEGY EXECUTION

1. Bridging the gap from planning to implementation.
2. When strategy comes second.
3. Five pitfalls to successful execution.
4. The seven prerequisites for change.
5. 12 ways to make sure plans work.

6. Eight "know-how's" for successful execution.
7. Where accountability starts.
8. What Seven Keys CPA Leaders know about goal-setting that Laggards don't.
9. Talk the walk and walk the talk.
10. How often you need to check project progress.
11. The winning formula for better business plans.

More About the SevenKeys program

New empirical research with thousands of practicing accountants, consultants, thought leaders, real-life experience and case studies show clearly why some firms succeed and others fail.

1. LEADERSHIP + MANAGEMENT

2. TECHNOLOGY TRENDS

3. MARKETING + BIZ DEVELOPMENT

4. CLIENT SERVICE + SATISFACTION

5. CREATING A GREAT WORKPLACE

6. BUILDING THE LEARNING ORGANIZATION

7. ENSURING STRATEGY EXECUTION

Now it's your turn to benefit from the findings and guidance from two of the top experts in the field.

With the Seven Keys to Successful CPA Firm Management, you will learn what it takes to succeed in today's competitive marketplace, including:

- The strategies and techniques for practicing top-notch leadership and management
- How to drive growth and productivity
- What's working in sales, marketing and business development
- Essential trends in technology planning and spending
- Measuring client satisfaction and leveraging client service for client retention
- Adding more revenue per client
- Creating a great place to work
- Building the agile, adaptable learning organization
- Turning great strategy into bottom-line results

The Seven Keys to Successful CPA Firm Management is based on a series of annual research surveys with thousands of survey responses and interviews with leading authorities.

Our research identifies the best practices and common characteristics that separate the competitively successful firms from the not-so-successful.

We call them “The Seven Keys Leaders” and “The Seven Keys Laggards.”

The Seven Keys research project quantifies what has long been unquantified: How certain management practices correlate with success in accounting firms. Thousands of CPAs continue to contribute their wisdom and experience to this one-of-a-kind project.

LEADERS GET RESULTS

Results confirm the research hypothesis that the most successful CPA firms are distinguished by a few key characteristics. As part of the project, we are filtering the survey results to separate the “leaders” in the profession from the “laggards.”

The essential methodology involves sifting the thousands of survey responses by a critically important measure: Is the firm a “Leader” or a “Laggard?” “Leaders” are firms that evidence above-par, even world-class, performance in the generally accepted metrics of practice management, such as:

- Revenue growth
- Profit margins
- Technical excellence
- Client satisfaction
- Staff morale and tenure
- Professional reputation and brand value.

“Leaders” clearly do things differently.

And they clearly get superior results.

- Leaders are *19 times* more likely than Laggards to enjoy superior revenue growth, and
- Leaders are *4 times* more likely than Laggards to face less fee resistance from clients and prospects.

Do you know what it takes to succeed in today’s competitive market?

- To win new business and attract top talent?
- To drive growth and productivity?
- To build real value and ensure smooth succession?

KEY RESEARCH FINDINGS

The research discovered some startling differences between Leaders and Laggards, based on a few essential management techniques:

Key 1. Leadership and Management

Seven Keys Leaders are *3 times* more likely than Laggards to adhere to a clear set of values.

Key 2. Technology Trends and Strategy

Seven Keys Leaders are *17 times* more likely than Laggards to follow a strategic technology plan.

Key 3. Marketing and Business Development

Seven Keys Leaders are *19 times* more likely than Laggards to surpass competitors in revenue growth.

Key 4. Client Service and Satisfaction

Seven Keys Leaders are *2 times* more likely than Laggards to have a formal program to monitor client satisfaction.

Key 5. Creating a Great Place to Work

Seven Keys Leaders are *4 times* more likely than Laggards to work as a team, not as individuals.

Key 6. Building the Agile Learning Organization

Seven Keys Leaders are *3 times* more likely than Laggards to conduct training that supports their business strategy.

Key 7. Strategy Execution

Seven Keys Leaders are *10 times* more likely than Laggards to establish specific and measurable business goals.

Any one of those management techniques could make a big difference in any firm. But together, they create huge advantages. We call them "force multipliers." They are the leverage that opens new and better pathways for a firm to achieve its objectives.

ARE YOU A "LEADER" OR A "LAGGARD?"

The difference could mean success or failure for your firm.

The Seven Keys Leaders know. And now you can too.

Join the newest, most scientific practice improvement program in the profession: "The Seven Keys to Successful CPA Firm Management."

About the Presenters

Jean Caragher is an award-winning, recognized industry expert with 23 years accounting marketing experience. Known as a knowledgeable, experienced, and tenacious marketing consultant to CPA firms Jean uses a practical, relationship-based approach to help CPAs achieve marketing success. Her approach is based upon her experiences as a CPA firm marketing director, a CPA association executive director, and her 12 years of consulting experience since forming [Capstone Marketing](#). Jean blogs at [What I've Learned So Far](#).



Capstone Marketing provides a variety of services including:

- Brand SurgerySM
- Marketing Audits, Planning and Implementation
- Retreat Facilitation
- Training
- Marketing Director Recruiting

Rick Telberg is the tax and accounting profession's leading researcher, analyst and commentator. As an industry executive, he has played leadership roles in such diverse media and commercial ventures as Accounting Today, WebCPA, SmartPros, CPA2Biz and the AICPA.



As president and chief executive of Bay Street Group LLC, he provides actionable information, strategic insight, and results-driven solutions to the professional tax, accounting and finance communities -- and the vendors who serve them.

BSG services include:

- Custom research and competitive intelligence
- New business development and strategy
- Channel marketing guidance
- Leadership retreats and strategy sessions
- Keynote presentations and on-site consultation

Visit [CPA Trendlines](#), for the latest research and analysis from [Bay Street Group](#).

Please don't hesitate to contact the presenters for more information:

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Get what it takes.

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