

American Institute of Certified Public Accountants
The Practice Development Institute

CPAs That Sell

A Complete Guide
to Promoting Your
Professional Services



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Cpas That Sell A Complete Guide To Promoting Your Professional Services

**August J. Aquila, Allan D. Koltin, Robert
A. Pitts**



Cpas That Sell A Complete Guide To Promoting Your Professional Services:

CPAs that Sell August J. Aquila, 1996 CPAs That Sell is a guide to assist CPAs in becoming more effective in business development In today s business environment customers need solutions to their problems and the best companies are retraining their sales forces to provide them CPAs That Sell takes an in depth look at how accounting professionals are adapting to this climate and actively promoting their services

Client at the Core August J. Aquila, Bruce W. Marcus, 2004-07-29 Clients At The Core is an essential blueprint to helping us all take the next steps The authors battle scarred by the evolution of professional firm management and marketing from then to now have captured the changing needs of the firms in this turbulent new economic era This is a well written book that uses plain language to convey practical well thought out ideas Patrick J McKenna a leading international consultant to professional service firms The authors have captured the changing role of professional services marketing and firm management There is valuable insight in this down to earth guide to competing successfully in the new environment David Maister author and consultant The book is a masterpiece Aquila and Marcus have produced the essential guide for managing a professional services firm They have marshaled their considerable real life experiences and far reaching vision into a veritable operating manual for the successful firm Rick Telberg Editor at Large American Institute of Certified Public Accountants At its heart this book is the running shoe for legal and accounting professionals who want to put the client first Following the evolution of the industry over the past twenty five years this must have for every professional services firm is the key to leading in the turbulent and highly competitive waters ahead Richard S Levick Esq President Levick Strategic Communications LLC coauthor Stop the Presses The Litigation PR Desk Reference Client selection and retention is one of the critical success factors for a professional services firm and Aquila and Marcus do a masterful job at educating us on the necessary ingredients of each The chapters on firm governance and paying for performance are thought provoking and certainly challenging to the conventional wisdom If you want a better understanding of marketing and leading a professional firm in these turbulent times this book is essential Ronald J Baker author Professional s Guide to Value Pricing and The Firm of the Future Client at the Core is a common sense approach to keeping your professional services firm relevant in the twenty first century client driven economy Aquila and Marcus have hit a home run with their insightful analysis and poignant prose Jeffrey S Pawlow Managing Shareholder The Growth Partnership Inc

Bull's-Eye! The Ultimate How-To Marketing and Sales Guide for CPAs Tracy C. Warren, 2016-11-21 Sponsored by PCPS and the Association for Accounting Marketing Whether your firm is getting back into the full swing of marketing and you are looking for some new ideas to jumpstart your sales efforts or you are getting serious about business development for the first time this book is designed for you Its purpose is to inspire teach and provide you with practical insight to help build results oriented marketing and sales programs in your organization Bull s Eye is a collaboration of 37 of the industry s most successful marketing and sales minds Collectively these gifted professionals have

served as pioneering practitioners inside the profession and as outside advisors and thought leaders for hundreds even thousands of CPAs and their firms They give you an insider s view of what it takes to build marketing initiatives that produce results Through the principles best practices and case studies shared in the book you can see success doesn t happen by chance but through careful planning development and implementation of well designed processes systems and tools This compendium of marketing know how shows you how to build your marketing team implement marketing techniques that get you noticed connect the dots between marketing and sales measure results and much much more **CPA's that Sell**

August J. Aquila,Allan D. Koltin,Robert A. Pitts,1996 Not a typical selling books this resource assists CPAs in becoming more efficient in business development CPAs will learn how to attract new business by effectively promoting their professional services and how to plan a successful sales call with tips from accountants who sell every day **The Quick and Easy**

Guide to Delegation Sheryl L. Barbich,1996 **Charter** ,1996 **Managing Sales Professionals** William

Winston,Joseph P Vaccaro,2013-01-11 This book is designed for sales managers as they make decisions and solve problems on a day to day basis Managing Sales Professionals provides readers with specific details and illustrates how to plan organize staff operate and evaluate a sales force and its activities This book offers an approach that is practical and realistic one that is needed by sales managers who want to oversee a successful sales staff The author Joseph Vaccaro uses an integrated model approach He integrates the marketing mix as it relates to selling and then he delves into the daily situations and problems readers encounter as practicing sales managers With cases at the end of each chapter that make the chapter material come to life Managing Sales Professionals is a practical tool for those in the world of marketing and sales management It is a realistic pragmatic practical how to approach that explains complex concepts in a clear and concise manner Vaccaro avoids generalities and he cuts right to the critical specifics for sales managers in the real world Terms and concepts are clearly defined and each chapter concludes with penetrating questions to further develop your sales management skills Along with a highly pertinent chapter on legal and ethical aspects in selling Managing Sales Professionals covers how to recruit salespeople motivation procedures gender and racial diversity of the sales force how to plan and conduct a training program effective selling techniques how to develop brand awareness new sales technology how to determine pricing and discount policies compensation policies how to determine transportation policies control and evaluation procedures how to effectively interact with marketing Anyone looking to increase sales such as business owners consultants marketing professionals and practicing salespeople and sales managers can use this book to examine their sales staffs and look for areas in which to improve Managing Sales Professionals is also ideal for upper level undergraduate students as they learn the basics of how to sell organize and run a sales force *Utilizing the Strategic Marketing*

Organization James P. Stanco,1996 Here is a hands on guide to the new concept of the strategic marketing organization SMO Utilizing the Strategic Marketing Organization presents new insight into business to business marketing by introducing the

reader to the SMO The purpose of an SMO is to perpetuate and improve the business of the company by which it was hired This book discusses key components and benefits of SMOs while relating directly to readers problems and offering real time solutions Reading this guide and implementing its strategies will save money expand market share establish brand name and create final bid presence as businesses learn how to choose the right SMO They will also discover the advantages of using the SMO to determine the best program to promote the business and make it prosper within budgetary confines In Utilizing the Strategic Marketing Organization the SMO is revealed as the hired gun that is not a traditional briefcase in hand consultant an ad agency that makes pretty pictures or an internal desktop publishing department that puts snowflakes on the company s newsletter The powerful SMO is contrasted with the dwindling ability of the traditional advertising agency to meet real time needs particularly in the fast changing business to business marketplace Readers will find in this book how an SMO meets their needs for shrewd direction and fast action Author James Stanco gives readers a reliable reproducible format to aid in long and short range strategic tactical planning one that is flexible enough to target special opportunities and versatile enough to keep it all going in the right direction User friendly and easy to read this book includes two in depth fictional case studies of how SMOs work which enhance readers understanding of what SMOs really are and what they do Some of the specific areas chapters discuss are customer tailoring vs custom tailoring traditional marketing choices and why they don t work to desktop or not to desktop questions to ask when selecting the right marketing avenue common pitfalls of selecting a marketing avenue Utilizing the Strategic Marketing Organization is a vital resource for individuals concerned with their businesses small or large who want to exhibit greater growth profitability and control The author discusses features of the SMO concept but he features time and money saving benefits for all involved in or with a business venture novice and expert owners operators promoters marketers sales managers PR people and agency personnel Internal Marketing William Winston,Dennis J Cahill,2012-10-12 In today s business world competence is no longer enough in an employee competent employees are merely a starting point Internal Marketing Your Company s Next Stage of Growth details how you can improve employee effectiveness and therefore businessby marketing your firm to employees so they can more effectively serve outside customers and consumers Employees need to be knowledgeable about their firm and confident in it and its products and services in order to perform their duties in an optimal manner From this book you will gain a thorough knowledge and understanding of the concept of internal marketing how it can be implemented and the benefits that will result Environmental Marketing William Winston,Alma T Mintu-Wimsatt,2013-04-03 Environmental Marketing Strategies Practice Theory and Research is a timely resource for the 1990s It examines a broad range of issues that affect environmental behavior while providing materials and guidance to marketing decisionmakers It will guide your organization toward a decidedly green marketing movement toward marketing concepts and tools that not only serve your organization s objectives but preserve and protect the environment as well Environmental Marketing clearly defines the potential roles of

organizations consumers and governments and examines how these groups impact environmental factors through the marketing process The book helps you understand alternative perspectives to green marketing issues and in turn enables you to make clearer more conscious decisions toward improving your environmental marketing performance This resourceful text begins by defining the concept of environmental or green marketing and how the idea of a healthy planet and successful marketing strategies can co exist It discusses the consumer s behavior toward environmental products and how marketers can effectively educate them the guidelines involved in doing so and the consequences of failing to do so The marketer s position on environmental changes in industry is examined along with alternatives for striking a balance between marketing objectives and environmental concerns Finally the book discusses the global response to environmental marketing and where multi national organizations belong within this balance Environmental Marketing is a book for all managers involved in decisions impacting the environment It is also of great interest to public policymakers and academics who wish for quick insight into environmental marketing issues

Marketing Planning in a Total Quality Environment William Winston, John L Stanton, Robert E Linneman, 2020-02-27 Marketing Planning in a Total Quality Environment is a how to book designed for the marketing practitioner It provides detailed information on how to prepare and implement a marketing plan based in a total quality environment For the last twenty years the authors as marketing practitioners and educators have been deeply involved in the planning processes of many corporations This book Marketing Planning in a Total Quality Environment is the product of what they ve learned over the years from working with these diverse corporations and their executives The authors provide readers with each step in the total quality planning process complete with check sheets and plan formats After readers finish the book they can prepare a quality driven marketing plan that will be used and followed throughout the year instead of becoming a shelf item This book is for you and the many other marketing professionals who are faced with one or more of these situations You re doing a good job but you d like to do even better You re spending valuable time putting out fires You lack time to do the things that need to be done You re always having a hard time coordinating major marketing programs You re faced with a major discrepancy between where you are and where you d like to be you ve got a planning gap You realize that you ve got to offer your customers more quality if you re going to be competitive in the new market environment You d like to have a professional annual marketing plan one that will be well received by management and will also keep you and your staff focused throughout the year Because each step on how to develop a marketing plan is covered Marketing Planning in a Total Quality Environment is ideal for presidents of smaller firms marketing directors and planners product managers and planning specialists The authors include a sample fact book which can be used to store and analyze data planning forms which help convert data into information and marketing plan formats which ensure that the plan will get used

[A Marketing Approach to Physician Recruitment](#) James O. Hacker, Don C. Dodson, M. Thane Forthman, 1995 A Marketing Approach to Physician Recruitment is a how to manual designed to assist

hospitals in the physician recruitment process or to enhance already existing recruitment programs Given the ever changing status on health care reform hospital administrators and physicians are faced with the challenge of meeting the growing needs of patients as well as their own internal priorities In order to survive the medical profession as a whole must make the commitment to identify the needs of the community it serves while integrating the activities and roles of departments boards and staff In the past physician recruitment has tended to itself As part of a competitive system neither the individual provider nor the medical group can afford to ignore its physician profile This book is aware of the needs of today s hospitals and presents a program to facilitate the process of recruiting physicians The authors provide the reader with a step by step physician recruiting process They include additional materials to support the recruiting process The book is comprised of four sections The process section provides organization for the recruitment program by assisting readers with creating a written plan The resources section facilitates that plan s effectiveness by providing information for developing pro forms community support letters tracking forms incentive packages and legal documents The reference section lists organizations contact names addresses and phone numbers needed for recruiting A Marketing Approach to Physician Recruitment is the only book of its kind Hospitals can use it to develop a practical and proven process for recruiting physicians It is an effective tool for meeting the needs of patients and physicians alike

Managed Service Restructuring in Health Care William Winston, Robert L Goldman, Sanjib K Mukherjee, 2019-05-20 Survival in the growing managed care environment requires the integration of financial analysis market appraisal and administrative management The authors of Managed Service Restructuring in Health Care provide a unique tool for readers to enable them to make these successful management decisions in restructuring services The unique approach in this book assists health care managers and prospective managers as they seek to solve the problem of how to deal with health care services that appear to be no longer productive In Managed Service Restructuring in Health Care the authors provide a solid theoretical base for what they have developed in MSR Managed Service Restructuring a conscious not crisis management tool They prepare readers for implementing MSR techniques by describing them in detail for their application to readers situations MSR approaches to planned health care management as introduced in this book help administrators channel scarce resources to the services the community wants and needs most Facts and cases are offered as examples of when and how MSR techniques have been applied successfully The authors also include failure cases where if MSR techniques had been followed health care providers would have survived in several communities Incorporate the information in this book to enhance long range planning and prevent closure of health care services needed by the community Along with financial and marketing tools necessary for long range planning Goldman and Mukherjee list warning signals that alert professionals to the need to review the services and products offered They also fully explore these areas Product Life Cycle Boston Consulting Group s Portfolio of Business Growth Share Matrix Product Development Product Planning Public Service of Health Care Providers Centers of Excellence Service Diversification

Consolidation Investment Disinvestment Criteria Marketing in Competitive Environment for Health Services Health care managers hospital administrators and students in health services management programs can benefit from the focus on conscious planning in Managed Service Restructuring in Health Care While many of the examples take place within acute care hospitals the MSR approach and this book are designed to assist any health care administrator or manager With knowledge of when and how services can be prolonged professionals can more effectively lead their health care provider into a more competitive environment The analyses used in the book should enhance many readers knowledge of basic marketing and financial principles and theories important to restructuring and providing health services today Marketing Mental Health Services to Managed Care William Winston, Norman Winegar, John Bistline, 2020-04-03 Managed care is rapidly making traditional marketing strategies for mental health services obsolete Here is the definitive book that helps professionals understand contemporary market forces and how to reshape marketing strategies in an increasingly competitive environment Marketing Mental Health Services to Managed Care begins by demystifying the seemingly bewildering world of managed care systems It enables the reader to become a fully informed partner in providing services for managed care systems In an era in which many professionals are affiliated with one or more managed care networks this book guides clinicians toward greater control of their professional futures by providing the steps necessary to develop a successful managed care oriented practice strategy It will be especially helpful to the newcomer to practice in the 1990s or the seasoned practitioner interested in increasing referrals from managed care systems Readers of this highly practical new book learn how to analyze the market for clinical services how to plan and develop services for the managed care market and how to sell professional services in an era dominated by active payor entities The increased importance of automation group practices and effective office management skills are discussed Although of particular value to outpatient practitioners Marketing Mental Health Services to Managed Care also discusses marketing strategies and revenue generating ideas for inpatient mental health and substance abuse treatment facilities Program managers administrators and marketing professionals in the hospital industry will find this book a valuable investment Of special interest to all readers are chapters addressing the impact of managed care systems with their focus on accountability cost effectiveness and quality upon traditional clinical paradigms Brief therapy skills and techniques are discussed by these two veteran clinicians and writers Emerging clinical innovations and effective reimbursement strategies are also discussed in this remarkable new book A resource section managed care company directory and a glossary of terms make this a practical guidebook of long lasting value to professionals from many disciplines College professors and graduate students will also find Marketing Mental Health Services to Managed Care a valuable introduction to marketing professional services in the managed care dominated marketplace for healthcare today **Strategic Planning for Not-for-Profit Organizations** William Winston, Robert E Stevens, David L Loudon, R Henry Migliore, Stanley G Williamson, 2013-06-17 Strategic Planning for Not For Profit

Organizations covers all the steps involved in developing a strategic plan for a not for profit organization Strategic planning has become a critical issue for not for profit organizations as they strive for direction and orderly adjustment to a changing environment In this book the authors describe a strategic planning process that will help readers bring direction and unity to their organizations and help create a sense of enthusiasm and anticipation as organizations visions of what they can be begin to unfold Strategic Planning for Not For Profit Organizations is both a tutorial and an easily accessible reference It is packed with user friendly information to help readers prepare their own strategic plans and evaluate plans created by others The book presents essential concepts and techniques in a concise readily usable form that readers can immediately use in decisionmaking Worksheets and real life examples throughout the book help readers in the step by step development of strategic plans for their own organizations A set of appendixes includes a strategic plan outline and presents sample strategic plans so readers can see what one actually looks like and get a head start on theirs A complete guide to strategic planning for not for profit organizations this book covers everything from writing purpose or mission statements and setting goals to strategy development and evaluation and control procedures Managers and administrators of not for profit organizations will find Strategic Planning for Not For Profit Organizations an extremely helpful guide for their planning duties The book also serves as a valuable text or supplemental reading for college courses on managing not for profit organizations

The Art of the Exit Jacob Orosz, 2022-11-07 Written by Jacob Orosz one of the M A industry s leading authorities and host of the 1 podcast on mergers and acquisitions M A Talk Jacob is president of Morgan Westfield a nationwide M A firm and author of five books on M A *The Art of the Exit* A Beginner s Guide to Business Valuation *The Exit Strategy Handbook* *Closing the Deal* and *Acquired* Jacob has 20 years of M A experience and has valued and sold hundreds of businesses Less than a third of businesses on the market actually change hands So what does this mean for you Think about it with a significant amount of your wealth tied up in your business planning your exit is one of the most critical decisions you ll make *The Art of the Exit* contains winning strategies I ve learned from 20 years in the trenches selling businesses This definitive guide is broken down into 10 simple steps from preparing your business for sale to orchestrating the closing This handbook contains essential tips for owners of both Main Street and lower middle market businesses valued at 500 000 to 10 million This size range tends to be a no man s land for business owners when it comes time to sell That s because most business brokers work on smaller transactions while investment banks are accustomed to handling larger transactions Another challenge for businesses of this size is that the potential purchaser can be either an individual or a corporate buyer such as a competitor private equity firm or other company The problem here is that the marketing strategies negotiating tactics and processes can vary significantly depending on the buyer most likely to purchase your business MY STORY Twenty years ago when I began helping entrepreneurs sell their businesses I scoured the market for useful information In doing so I discovered that most of the available literature didn t address the real world problems I encountered Rather it was

theoretical or directed at large publicly traded companies It s difficult finding valuable actionable information for companies in this size range This book is loaded with proven strategies on the art and science of selling any business I walk you through the entire sales process from preparing your business for sale to the closing and reducing risk every step of the way You ll receive solutions and proven guidance based on my decades of experience helping entrepreneurs sell their businesses for top dollar The sale of your business will be one of the most stressful events in your life Don t go it alone What s Covered in the Book Statistics on how long it takes to sell a business A framework for helping you decide whether to sell your business Guidance on informing and retaining your employees Lessons learned for building a highly sought after business based on dealing with thousands of buyers Advice on building your deal team including an attorney broker and M A advisor A concise breakdown of the most common valuation methods and concepts A simple yet effective model for increasing the value of your business Recommendations on financing the sale and minimizing the risk of a default A synopsis of the four types of buyers what they re looking for and their goals Tips for maintaining confidentiality throughout the process A detailed analysis of the letter of intent and its key clauses A prescription for maximizing negotiating leverage A strategy for maximizing the price and terms Advice on preparing for and minimizing risk during due diligence Tips for negotiating the purchase agreement and transaction structure *The Complete Guide to Marketing Your Law Practice* Hollis Hatfield Weishar,James A.

Durham,1999 A complete guide to marketing law firm or practice Contains strategies and insights from the country s top legal marketers **American Book Publishing Record** ,1996 *The Lawyer's Guide to Marketing Your Practice* James A. Durham,Deborah McMurray,2004 A well developed successfully executed marketing plan will attract new clients increase referrals and strengthen client loyalty This resource will help you master the creative marketing solutions you need

Squeezing a New Service Into a Crowded Market Dennis J. Cahill,1995 Squeezing a New Service Into a Crowded Market begins to answer the question of how to successfully offer another service in what appears to be an already crowded market Is there room for one more hospital Another law firm Another newspaper Another spreadsheet Yes according to Dennis Cahill He shows readers how through theory and case studies to define produce and market a new service in a field where there already exists a similar service He provides a roadmap for successful planning and introduction of new services This roadmap uses perceptual mapping and case applications to show how adding a new service should and should not be done Perceptual mapping is fully described and its use to find gaps in the service coverage is detailed Three case studies of services which have been introduced into crowded markets are used to show how and how not to offer a new service Cahill looks at these services from the perspective of customer design and internal development Both practitioners of services marketing and advanced marketing students who want the real world application of the marketing theory learned in the classroom can benefit from Squeezing a New Service Into a Crowded Market Part I explores the research necessary to utilize Cahill s approach In Part II Cahill presents detailed case examples from his own files of how various services were offered to

crowded markets and all failed These case analyses dissect the failures explain where why and how they failed and interpose what could and should have been done to prevent or at least reduce the probability of a failure Readers will clearly see the common thread running through these failures and will be able to avoid failures of their own Part III deals with innovation and how to handle it in a service firm

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