Tax Season Tune-up

How to Make the Most of Your Business Development Season

Taking time now for a tax season tune-up will help your firm:

Run Smoother - Minimize Breakdowns

Position your firm to travel in new directions

Pick up new opportunities along the way

Join us for this powerful webinar series:

1. **Social Media - Building Your Buzz - 11/17/09**
2. **Ditch the Return - The 5 Key Measures to Talk About - 12/1/09**
3. **Take a Position - Establishing Your Firm's Voice - 12/8/09**
4. **Converting Conversations Into Engagements - 12/15/09**
5. **Kaizen for Accounting Firms 1/5/10**
6. **Emotional Intelligence ; Building Block for Superior Performance 1/12/10**

MENTOR PLUS®

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Program Details

The right tax season focus

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New opportunities in 2010

Overview

It's no secret that tax season is the best time to market your firm. Unfortunately, even when we know what we should be doing, opportunities pass us by because we are focused on the wrong things. This webinar series is designed to "prime the pump" with tools, techniques, and insight that will keep you and your team focused on the right things so you can make the most of your business development season.

Who should attend?

- Practitioners interested in honing their rainmaking skills; juniors through partners
- Members of your Marketing Team who understand the importance of creating remarkable "first and lasting" impressions.
- Firm Administrators interested in reducing overhead and having more fun!

What does it cost and how can I involve my team?

$69 per session or $249 for the entire series

When is it happening?

2009 2010 Session Dates

Session 1: Social Media - Building Your Buzz………………………….…………….. 11/17

Session 2: Ditch the Return - The 5 Key Measures to Talk About…………………... 12/1

Session 3: Take a Position - Establishing Your Firm's Voice ……………………….. 12/8

Session 4: Converting Conversations Into Engagements ……………….………….. 12/15

Session 5: Kaizen for Accounting Firms ………………………………………….….. 1/5/10

Session 6: Emotional Intelligence - Bridging the Human Capital Gap ……………... 1/12/10

All sessions are 2 hours—see schedule on www.cpelink.com for exact times

Session Details

The Knowledge Your Clients Want You To Have

Session 1:

Social Media - Building Your Buzz

Hosted by Geni Whitehouse, Countess of Communication

There are only three things you need to know about social media:

1) **You had better get on board**
2) **Your firm had better get on board**
3) **Your clients are already on board**

Find out what all the buzz is about and what you can do to build your own so you can stay "top of mind" with your client's and prospect's even during tax season.

"Mentor Plus always seems to have the right message, in the right place, at the right time."

Rich Rackers, CPA

Session 2:

Ditch the Return - The 5 Key Measures to Talk About

Hosted by Edi Osborne, Motivational Mentor

Instead of focusing on your client meetings around last year's outcomes, shift the dialogue to something that really matters, their future. Start down the advisory path with your clients by pointing out the 5 key measures they need to focus on to improve their outcomes for 2010. The good news is you don't have to wait until 2010 to start applying this approach. You can start right now with your year-end meetings.

By shifting your focus right now and planning the right seeds with your clients, you'll be able to harvest plenty of advisory work come spring.
Who said you couldn't grow anything in the winter?

"I was heading to see a client that I knew was planning to fire us; a $150K per year client. I braced myself for the barrage of complaints; some of which were quite valid.

All the way to the appointment I kept hearing Edi say "People X Process , People X Process"

Long, story short, the relationship with this client was repaired and is now better than ever."

Michelle Ward, CA

Session 3:

Take a Position - Establishing Your Firm's Voice

Hosted by Geni Whitehouse, Countess of Communication

Tax season presents dozens of opportunities to communicate (both actively and passively) what your firm is all about:

- **Who you are**
- **What you are passionate about**
- **And how this translates into benefits for clients and prospects**

This session will help you learn how to stand out and have your "voice" heard in a very noisy, crowded marketplace.

"One good idea from Mentor Plus each year pays for my investment in their training programs. Over the years I've gotten dozens of good ideas -You do the math!"

Tm Tikalsky, CPA

Session Details

MENTOR PLUS®
The Knowledge Your Clients Want You To Have

Session 4
Converting Conversations Into Engagements

Hosted by: Edi Osborne, Motivational Mentor

We've all heard the saying, "all talk and no action." Unfortunately, all too many client meetings live up to this saying. You know how it goes, you have a great meeting, talk about a dozen key issues, and yet nothing crystallizes into billable services. In fact, much of the time, you give away valuable advice during these sessions that is lost in the informality of your professionalism.

Having a formal framework and structured professional follow-up for client meetings is the key to harvesting opportunities. In this session, you'll learn how to convert client conversations into actions that have value for both your firm and your clients.

"Mentor Plus tools and techniques are the foundation of my marketing and sales strategy. Their consultative approach closes the sale, so I don't have to."

Craig Underhill, CPA

Session 5
Kaizen for Accounting Firms

Hosted by: Edi Osborne, Motivational Mentor

The Japanese call it "Kaizen." Savvy firms recognize Kaizen (translated: Continuous Improvement) as their core competitive advantage when it comes to eliminating waste and reducing costs. Firms, like all businesses, are having to do more with less. The Kaizen "keen eye" is a cultural phenomenon that makes the difference between just having staff "do their job" and fully engaging the team in the strategic management of your firm through effective self-management .

Tax season provides an ideal proving ground for developing a Kaizen culture in your firm. This is a session you will want to involve every one on your team.

"I have been in the profession a long time. Mentor Plus has added more value to my practice than any other single organization.

And I am having a lot more fun!"

Woody Levitan, CPA

Session 6
Emotional Intelligence; Bridging the Human Capital Gap

Hosted by: Steve Osborne, Student of Human Behavior

All of us arrive on this planet with certain skills, values, behaviors, and innate abilities that influence how effectively we navigate the "gap" that resides between ourselves and others. The "gap", depending upon how small or extreme it is, can make the difference between a workplace filled with negative, passive aggressive behavior and a functional, emotionally intelligent team environment. The stress of tax season often serves to amplify the gap. Learn how to nip the gap before it can have a negative impact on your team.

Participants in this session, will take an assessment that measures Emotional Intelligence. You'll learn how to interpret your assessment, set goals for improvement in key areas, and monitor your progress as you work to improve your inter and intrapersonal relationships.

"My former style has been to focus on the work and let other people know that I will run them over if they do not get out of my way; I was not here to babysit my staff. However, as managing partner, this approach didn't do much to build an effective team. My associate, Ron, and other staff members would tell you I am a kinder, gentler managing partner because of Mentor Plus training. This stuff works."

Jerry Tenney, CPA