

Company Name

Kline & Merryweather CPA, PC

Date 2012

STEP 1

Company Vision

Vision

What will this company look like after 5 -10 years? What will this company be known for? Use the present tense.

- KM CPA provides tax and consulting services to over 500 individuals, corporations and partnerships. Our gross revenue tops 1.5 million annually. Each partner earns \$300,000 annually.
- Our professional team and administrative staff's experience, technical strength and close personal relationships with the client are unparalleled in the industry.
- We specialize in Healthcare Accounting for Doctors and Dentists, Oil and Gas Accounting, and Hospitality Accounting; although we have clients in many other industries as well.
- The owners Jim Kline and Kimberly Merryweather take 4 weeks of vacation annually, and take Fridays off during the off season.
- Jim and Kimberly are sought after industry experts and are often invited to speak at industry events, on radio shows, and on television.

STEP 2

Mission Statement

Mission

What is the purpose of this business? Use no more than 1-2 sentences.

KM CPA is a business tax and accounting practice and business advisory company that understands their clients' businesses, cares about their success, and is quick to respond and be hands-on to each client's interests. We use sophisticated tax strategies to minimize taxes while focusing on maximizing financial statement income.

STEP 3

Branding

Branding

How will this business differentiate itself in the Market Place? List your strategy to tie your brand and colors into your business cards, tagline, website, blog, and marketing materials.

Brand: We have a professionally designed brand that imparts trust, safety, and security using various shades of blue and white. Our web site page banners are professionally designed and vary with each section of our web site. Our business cards and brochure are made from the finest quality paper.

Business Card: lists our three niche markets and tagline. Back of card lists resources on our web site.

Tagline: Helping Clients Keep More of What They Make

STEP 4 Creating Meaningful Goals

Meaningful Goals

Create goals that are meaningful to you. Add target dates. How are you going to measure your success?

- Gross revenue 2012 \$700K, 2013 \$900K
- Niche clients: obtain 3 new Healthcare clients, 3 Oil and Gas, 3 Hospitality by end of 2012; furthermore, obtain 20 non-industry specific clients
- Increase web site Pagerank up from 2 to 4 by 12/2012 so that we appear on page 1 of Google for key word searches
- Write two articles for our web site per month
- Create a web-based information product to sell by 12/2012 "How to Start and Grow a Successful Doctor's Practice."
- Develop a pipeline of 50-100 prospects by 12/2012
- Jim and Kimberly will join Toastmasters by 3/2012 and attend weekly to work on public speaking skills
- Apply for Certified Business Appraiser (CBA) by 12/2012

STEP 5 Strategies

Strategies

How will you build this company over time?

- DEVELOP a team of employees and managers who can manage the office, marketing activities, clients, and personnel - with ease
- EXPAND referral network to successful attorneys, financial planners, and insurance agents
- POSITION our firm as an absolute expert in our niche markets through writing, speaking, and reading entrepreneurial material and industry material
- DEVELOP financial strength and strong cash flow to support the practice marketing goals
- CREATE a first class web site to attract new business
- GROW the Business Appraisal side of the business

STEP 6 Marketing Activities

Marketing Activities

Your marketing activities are the actions used to build your business and achieve your Meaningful Goals. Include: Internet Marketing, Referral Marketing, Advertising, Promotions, Publicity, & Customer Contact. Make sure to include Target Dates.

- Testimonials: Get five new benefit-driven testimonials for the web site by June 2012
- Networking: Attend Chamber events, join niche industry associations and attend events – 5-10 events per month
- Referrals: Have coffees/lunches with 1-2 COI each week
- Public Speaking: Seek out 3-5 talks with our niche markets annually
- Monthly Newsletter: send out newsletter monthly to existing clients and prospects. Include a Market Summary, Economic Data, and one useful tip per month, with a personal message from either Jim or Kimberly. Include links back to web site.
- Web site: Include a newsletter sign up box on all pages of web site by 6/2012; add an Articles page; create a Resources page
- Do a complete overhaul of Search Engine Optimization on web site by 9/2012
- Client retention: make 10 proactive calls to clients weekly
- Prospect Pipeline: call 10 prospects per week
- Video Marketing: create one video per article and add to our website and YouTube monthly