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Firm Brochures

Targeted Marketing Calls for Targeted Brochures

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*Over the last several years, a number of CPA firms have evolved from general practitioners to industry and service-line specialists. In marketing jargon, these firms are practicing **targeted marketing**: they have divided the market into many unique industry segments and special service needs; evaluated each segment; and selected specific ones to serve. This article will discuss how the firm brochure can help position the firm and communicate these meaningful differences to targeted audiences.*

Two Approaches

There are two basic approaches to creating industry and service line brochures.

Modified Capabilities. This format is mentally and fiscally a small step away from the traditional capabilities brochure. It contains the usual topics such as firm philosophies and approaches to accounting, audit, tax and general consulting. In addition, it discusses the firm's special niche or industry services. The best ones keep the discussions of traditional accounting, audit and tax work to a minimum.

I recommend a 9 X 12-inch "folder-brochure" format with an open flap in the back to hold specialization inserts. (Be sure to include a business card slot.) The specialization pieces are formatted for 8.5 X 11-inch stock and communicate the firm's special expertise by industry or service line. They can be preprinted or custom output on the firm's stationery via a laser printer or a quick copy service.

This approach allows the service group to lean on the traditional accounting services for credibility and yet emphasize its own service specialty to the readers.

Family of Brochures. This is a much more aggressive approach. A series of dedicated brochures are created to relate the firm's special services and expertise to specific segments. The general practice is downplayed or not mentioned

at all (other than inclusion of the firm logo). Costs are higher, but so is the firm's commitment to targeted marketing and the ensuing payoffs.

I like the 9- X 12-inch folder-brochure format here as well. The folder can hold service team bios, articles published by team members, letters of recommendation, etc. Firms on tighter budgets may prefer briefer 2- or 3-color brochures that fold to a 4 X 9-inch format. These smaller brochures can stand alone, or when appropriate, be enclosed in a quality, off-the-rack, pocket folder along with a cover letter, bios, articles, etc.

Consistency is the watchword for the family of brochures. It's important to maintain a strong firm identity while promoting the individual service areas. Consistent logo placement, use of typography, white space, and graphic accents (rules, screens, etc.) are critical. Have your design firm create a strong, shared approach that allows for some graphic flexibility. Copy consistency must be achieved as well. The style and tone of the copy, and any statements of facts, should agree from one brochure to another.

Putting Literature to Work

While some may believe brochures are required because competitors have them, they'd be wise to consider their place in the firm's new business development activities. Who will read them, what do you want to communicate to the reader, and how do they fit into the buying process? Listed below are common uses of the firm brochure.

Leave-Behinds. Few accounting-related services are sold in one meeting. The brochure can be left behind with the client as a reminder of the presenter and key selling points. They also provide a name and number to call.

Inquiry Fulfillment. Firms and individuals actively engaged in marketing will generate inquiries from prospects through community and professional involvement, newsletters, seminars, article publishing, print advertising, etc. A brochure can be sent before making a follow-up sales call.

Direct Mail. A sales letter accompanied by a fact-filled brochure is an excellent way to introduce your service and generate leads.

Sales Proposals. Brochures can accompany a sales proposal. This helps the firm keep the proposal short and focused on key client service issues. The brochure gives the prospect additional, supportive information in a separate and refined package.

Content

Listed below are possible content subjects for your targeted service brochure. Emphasis should be given to copy that builds your case for service expertise.

Firm Description. A concise description of the firm, its capabilities, and its philosophies.

Specialty Service Introduction. Tell the reader who you are and introduce the unique services offered and why they should consider you further.

Problem Assessment. Describe typical problems encountered by the target audience. Tell them how to best select a consultant.

Methodologies. Complement your problem assessment copy with a discussion of your problem-solving expertise. Inform them of your methods of evaluation and approach to problem-solving.

Benefits. How will prospects prosper from your expertise? Explain why they should hire you versus competitors. Give examples of client gains or cost savings.

Client Lists. List organizations served and references. Include a brief description of the engagement. Be sure to clear with the client beforehand.

Testimonials. A step better than a client listing, ask a couple satisfied clients to state, in their own words, their delight with your work. Include their picture, name and title for added credibility.

Bios. Biographical information of the chief service professionals can enhance your presentation. Describe outstanding skills and reputations. The folder-brochure format allows you to custom write and insert the appropriate bios for each situation.

More Information. Let readers know how they can contact you, get more information, or further initiate the process.

The Cost Dilemma

How much will your brochures cost? While it's difficult to estimate, I can advise you to ask yourself these questions beforehand.

- What other expenditures are planned for the year and how do you rank their priority?
- What are your business and marketing objectives for the next three to five years?

Common Brochure Mistakes

- **Canned Copy & Design.** Do-it-yourself software programs are easy to use, but don't match the quality of a customized, professional job.
- **False Claims.** Copy should accurately describe your core services and any true areas of specialization. Including areas of limited or nonresident expertise will eventually cost you business.
- **Phone Directories.** A listing of firm professionals and their credentials doesn't offer persuasive (selling) information and hardly seems worth the effort.
- **Odd Sizes.** Odd sizes stand out from the crowd, but brochures of either the 9 X 12-inch or 4 X 9-inch sizing fit into standard envelopes and are more likely to be saved for future reference.
- **Dated Materials.** Like apparel, brochure design and copy content need to change over time. Plan to update every 2 to 3 years.
- **Graphic Inconsistency.** This is one of the greatest dangers of creating a family of brochures. There is a tendency for each area to want something so different that it betrays the overall firm identity.
- **Over-Designed.** Good design is tasteful and reflects the firm's character and budget. Over-designing can lead to pretentious graphics and a pinched pocketbook.
- **Obsolescent Photos.** Photos of service professionals will eventually void a brochure. Think twice before using employees as models.
- **Verbosity.** A few well-said words are better than too many. A good art director creates visual power with style, graphics and typography.

- How important are brochures to your marketing objectives, strategies and tactics?

Brochures will require an investment of time and money. You can better manage the process by understanding the factors involved.

Several elements effect the cost and quality of your brochure. Ask your outside consultant(s) to explain how paper stock, use of color, die-cuts, design, format, photography, charts, and illustrations can effect the final cost and quality.

Conclusion

Some years ago CPA firms recognized the need for brochures in their daily business. As they've embraced targeted marketing concepts and techniques, they've found additional value in creating targeted brochures. Deliberate choices about the look, quality and content of your brochures, can help build your image, establish credibility with prospects, inform and educate clients, and help sell your services. ■

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