



CAPSTONE MARKETING

IMPORTANT ONLINE WORKSHOP INSTRUCTIONS

Dear Aprio Firm Foundation Member,

Thank you very much for registering to attend our online workshop **"How to Upgrade Your Client Base to Optimize Profits"** presented by Capstone Marketing. The workshop is scheduled for:

Thursday, June 23, 2022

2:00-3:00 p.m. Eastern

(That's 1:00 p.m. Central, 12:00 p.m. Mountain, 11:00 a.m. Pacific)

Please click the link below to join the workshop:

<https://zoom.us/j/99909617814?pwd=UHEzVGRBNWRWaHUoc3FoSTJLdm4yUTog>

Passcode: 056699

This workshop will start promptly at 2:00 p.m. Eastern. *Please connect 10-15 minutes in advance for a tech check. We will not be able to handle service or support requests during the session.*

Here are some useful tips to get the most out of the workshop:

- Reserve a conference room and set up a data display and computer so all of your team members can watch the presentation – using safety protocols, of course.
- **Advance Preparation** (recommended): Prepare a spreadsheet/report of your client base segmented between individual and corporate clients. Include as much information as possible:
 - Fee history (three years)
 - Realization (three years)
 - Payment history
 - Services provided
 - Timing of the work

You will refer to your spreadsheet/report throughout the workshop to get you started on the action steps needed to upgrade your client base.

- During the workshop you can submit questions using the Q&A function. You are asked to keep your microphone muted except when asking a question.
- Submit your questions in advance by emailing jcaragher@capstonemarketing.com.

CPE Credit

- The list of those who login is part of the verification process, so please use your first and last name.
- You are required to answer three polling questions.

Watch your email for additional reminders from Capstone Marketing. To be sure these emails are delivered to you, please:

- Add jcaragher@capstonemarketing.com to your email client address book, and/or
- Ask your IT/email team to whitelist capstonemarketing.com.

Meanwhile, I look forward to a fun, focused workshop with you.

Sincerely,

Jean Caragher
Capstone Marketing

P.S.: If you have any additional questions or requests before the webinar, please don't hesitate to email jcaragher@capstonemarketing.com no later than 30 minutes prior to the program.

P.S.S. This workshop will be recorded.