

STYLE GUIDE

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LOGOS

Primary

For use in all marketing, sales and promotional materials. Note: For display purposes ONLY, a gray box is shown behind the sample below to highlight that the white background/border is a fixed element of the logo.



Secondary

For use in all marketing, sales and promotional materials in instances when required to be LESS THAN 1" in width. Note: For display purposes ONLY, a gray box is shown behind the sample below to highlight that the white background/border is a fixed element of the logo.



COLORS

Color	Pantone	СМҮК	RGB	
	N/A	C37 M11 Y100 K0	R174 G190 B37	

Note: The green color may be desaturated, as needed. For example, if it is the background behind a Replacing the Rainmaker green header.

Color	Sample 1	Sample 2	Sample 3
	50%	25%	10%

1

For all materials except forms

Font	Use	Color	Font size	Software
SIGNPAINTER HOUSEBRUSH	Title on cover page	Green or Black	varies	All
SIGNPAINTER HOUSEBRUSH	Main headers in content pages	Green	14	All
Futura Std Book Heavy	Sub headers in content pages	Black	12	Illustrator
Futura Std Book Bold	Sub headers in content pages	Black	12	All except Illustrator
<u>Futura Std Book</u>	Sub-sub headers in content pages	Black	10	All
Futura Std Book	Content text	Black	10	All

Forms

Font	Use	Color	Font size	Software
Verdana	Name of form header	Black	18	Microsoft Word and Microsoft Excel
Verdana	Main header in content pages	Black	14	Microsoft Word and Microsoft Excel
Verdana Bold	Sub headers in content pages	Black	11	Microsoft Word and Microsoft Excel
<u>Verdana</u>	Sub-sub headers in content pages	Black	10	Microsoft Word and Microsoft Excel
Verdana	Content text	Black	10	Microsoft Word and Microsoft Excel

Note: To access the Replacing the Rainmaker fonts (SignPainter and Futura Std), contact Replacing the Rainmaker.

FORMATTING

- Main headers have one blank line between themselves and the next line of text. This blank line is size 10 font of the content text.
- Sub headers do not have a blank line between themselves and the next line of text.
- Sub-sub headers are preceded by a size 10 font blank line.
- Sub-sub headers do not have a line between themselves and the next line of text.
- Only the first word of a heading/title should be capitalized. For example: "Sources of new business," not "Sources of New Business."
- Headers in lists should be bolded, not underlined or italicized. Headers in sub lists should be bolded and italicized. Example:
- 7. **Follow-up on referrals.** Be sure to follow up on referrals. Your approach will vary depending on whether they offered any names when you first broached the subject.
 - If they did not offer names: Reconnect with the individual over the phone after a suitable period of time. Remind them of your interest and ask if they have identified any suitable referrals after your last meeting. If they do offer names, take them down and ask if it's okay to contact the person directly or if they would prefer to pass the information along themselves.
 - If they offered names: Reconnect with the individual over the phone to keep them apprised of any follow-up you've had with their referral contacts. Thank them for their help and ask them if they would like to be involved in the client solicitation process. You can also inquire about whether they've thought of any additional referrals since your last meeting.
- Headers in the first row of a table should be bold and centered. Example:

Referral source type	First name	Last name	Title	Business name	Business type
Centers of influence	lan	Tonks	President	Replacing the Rainmaker	Consultant

Miscellaneous formatting

- Numbers in numbered lists should not bolded.
- Tables should have a space both above and below.
- Table borders should have a .5 weight.

PUNCTUATION

- Periods at the end of sentences are followed by a single space.
- A period is used at the end of bulleted item only if what follows the bullet is a complete sentence; otherwise, no period should be used.
- Colons within a sentence are followed by a single space, not a double space.
- Colons at the end of an introductory sentence should not be followed by a blank line, unless a header follows them.
- Punctuation should be included within quotation marks ("What's your name?").
- Oxford commas are NOT to be used. CORRECT: "lions, tigers and bears." INCORRECT: "lions, tigers, and bears."
- References to books are placed in quotations ("Never Eat Alone").
- Spaces are to be included between hyphens, unless it's a hyphenated word. CORRECT: 11:30 a.m. 1:00 p.m. INCORRECT: 11:30 a.m.-1:00 p.m.
- Em dashes (–) are used as dashes within text ("Make the focus about the audience their contribution or their importance"). Be sure to include a space before and after the Em dash.

BULLETS

- Bullets are round and match the size of the font used in the associated text.
- Bullets are placed at the far left margin and the following text begins with a .25 indent.
- If the header of a bulleted/numbered list is a sentence, it's followed by a period. If it's only a phrase, it's followed by a colon.
- Bulleted and numbered lists should not have a space following the introductory text. They should have a space following the list. See the example below:

Maintaining eye contact with your audience helps keep the tone conversational, which makes your talk more engaging. Audience members will feel that you have genuinely connected with them. Follow these tips to establish better eye contact:

- **Shrink the room.** Imagine that the person you're looking at is the only person in the room. For those few seconds you're having a one-on-one conversation with just that person.
- Move to another person at an appropriate time. At the end of a sentence or paragraph, switch your focus to someone else.
- **Keep your eyes up.** Discipline yourself to keep your eyes up until you've finished your sentence, then look down. Look at your notes in silence. When you're ready to continue, look up, find someone to talk to and then start talking.

When delivering a presentation while standing, you want to adopt a neutral stance with your shoulders back, chest out, stomach in, knees relaxed, feet slightly apart, and hands open and relaxed by your side.

WORDING

- When referencing the book "Replacing the Rainmaker," always use a lowercase "t."
- B2B and B2C are never to include hyphens. CORRECT: B2B and B2C. INCORRECT: B-2-B and B-2-C.
- Advisor is to be spelled with an "o," not an "e." CORRECT: Advisor. INCORRECT: Adviser.
- The word "email" is never to be hyphenated. CORRECT: email. INCORRECT: e-mail.
- The word "website" is one word. CORRECT: website. INCORRECT: web site and web-site.
- The "t" in the word "the" in "Replacing the Rainmaker" is to be capitalized ONLY when writing out a website address. CORRECT: ReplacingTheRainmaker.com INCORRECT: replacingtherainmaker.com and ReplacingtheRainmaker.com
- When typing out ReplacingTheRainmaker.com or any website address, never include "www."
- Numbers 10 and above should be written out numerically, not spelled out (for example, eight, nine, 10, 11).
 EXCEPTION: In mathematic equations and percentages, all numbers should be written numerically.
- When referencing book resources, the number in the www reference is superscript (www²).
- Times are written with a single space between the time and a.m. or p.m., and there are periods included in the a.m. and p.m. references. CORRECT: 11:30 a.m. 1:00 p.m. INCORRECT: 11:30 am 1:00 pm.
- Dates are written as MM/DD/YYYY.
- "Question and answer" is abbreviated as "Q&A." CORRECT: Q&A. INCORRECT: Q & A and Q and A.
- Use the % sign, do not write out "percent." CORRECT: 6%. INCORRECT: 6 percent.
- Use "and" instead of "&," except in the case of "Q&A."
- References to client classifications are "A"-level, "B"-level and "C"-level.

BRAND MESSAGING

The following are "Replacing the Rainmaker" brand messages used in verbal and written communications:

My ideal client

My ideal client is an accounting firm that wants to implement sustainable practices to make business development a firmwide priority. I work with firms of all sizes, but my prototypical client is a firm with at least three partners, 30 employees and \$3 million in annual revenues.

Who I am

I'm a business development consultant and author of the book "Replacing the Rainmaker." I provide coaching and consulting services to accounting firms, helping them implement practices to ensure their long-term business development success. I thrive on helping my clients realize their potential. It's my belief that everyone has what it takes to succeed at business development — they just need to be given the chance to develop the right skills. I'm a problem-solver and solution-finder. I see patterns where others see complexity and I excel at improving upon existing ideas. My clients describe me as "hard-working, organized, creative, energetic, happy and relentless." In everything I do, I live by the mantra, "Better is best."

I currently run a business development-focused consulting firm, providing sales and marketing expertise to Bay Area accounting firms. Previously, I spent seven years as president of a multi-sport camp and sporting goods provider and three years as associate vice president of advancement and athletics at a Bay Area university. A native of England, I hold a bachelor's degree in sports science from the University of Northumbria and an MBA in strategic leadership from Dominican University of California. I live in Novato, California, with my wife and daughter.

What I do

I help accounting firms achieve business development success. I'm the author of the book "Replacing the Rainmaker" and creator of the accompanying workshop series, which is available online. I also offer on-site consulting services to help accounting firms implement the ideas outlined in the book and workshops.

Who I do it for

Accounting firms that want to implement sustainable practices to make business development a firm-wide priority.

What makes us different

Book: "Replacing the Rainmaker" offers a comprehensive guide to improving your business development efforts. Other business development books in accounting are more theoretical. This is a practical book full of step-by-step processes. The book is supported by online resources that help you to do the very things described in the book — create your targets and KPIs, draft your business development plan, articulate your ideal client profile and more.

Workshops: Our workshops are available online, on-demand, meaning you can watch them anytime, anywhere. They're participatory, engaging and encourage you to practice what you learn outside of the classroom. They're an incredibly affordable way to provide business development training for your entire firm and they offer a level of depth for business development training for accountants that is difficult to find elsewhere.

Consulting services: I bring a fresh perspective, drawing on what I learned from my two decades in the for-profit and non-profit sectors. I take what's worked in other industries and bring it into the arena of accounting. My clients increase their new business revenue by 37.5% on average during their first year of working with me, and realize annualized gains of 5%-25% year after year.

A description about the book

"Replacing the Rainmaker" is a practical guide to business development for accountants. It offers an array of tools, techniques and strategies to help accountants win more work. It gives you everything you need to launch a successful firm-wide business development effort.

- **Clear takeaways:** The book is divided into 14 chapters, housing 96 short topics. Each topic culminates with three key takeaways and many topics include step-by-step processes to help put the ideas into action.
- **Supplemental resources:** The book is supported by our website, which includes templates, spreadsheets, forms and any other materials you need to jump-start your business development efforts.
- **Solution-focused:** Often as storied business developers retire, firms are left scrambling to replace their knowledge, intellectual capital and book of business. This book will help you implement the necessary systems and processes to ensure your long-term success.

The book is written for any CPA, whether you're a sole practitioner, staff accountant or partner at a large firm. If you have an open mind and a desire to grow your business through calculated business development strategies, this book is for you.

A description about the workshops

The "Replacing the Rainmaker" workshop series offers dozens of online workshops to help accountants develop the skills they need to succeed in business development. Each workshop focuses on a practical business development tool, technique or strategy. It explains why the concept is important, how you'll benefit from following our advice and outlines specific processes for putting the content into action.

- Watch anytime: Our workshops are available on-demand, so you can watch on your own schedule.
- **Share your voice:** Our workshops are interactive and participatory. Each workshop includes in-class activities and a continuing education assignment, which encourage you to actively engage with the material and use what you learn outside of the classroom.
- **Make a smart investment:** If you're looking for the best way to provide business development training to your entire firm, our workshops offer an incredibly affordable way to do that. For a 45-person firm, the per-person annual cost is less than \$170 for the entire workshop series.

We currently offer 41 workshops that cover messaging, marketing, networking, prospecting, sales, niche development and more. A typical workshop lasts one hour and includes an audio presentation, two in-class activities, a continuing education assignment and a quiz. Each workshop comes with an accompanying workbook and any relevant forms and spreadsheets.

A description about our consulting services

We provide coaching and consulting services to accountants with one goal in mind: to give them the tools they need to succeed in business development.

- **History of success:** I have substantial experience providing sales and marketing expertise to small and large regional accounting firms. I'm offering tried and tested ideas that produce results.
- **Unique perspective:** I draw on what I learned from my two decades in the for-profit and non-profit sectors, bringing what worked there into the arena of accounting. Unlike other consultants, I do more than just share ideas and provide coaching. I'm the first to roll up my sleeves and do the work!
- **Dedicated support team:** I provide access to a talented and dedicated team of professionals, including researchers, writers, graphic designers, videographers, social media specialists and web developers. You get and pay for a coordinated team only when you need it.

If you need assistance implementing the ideas in the book and workshops, we're here to help. We'll do everything we can to exceed your expectations, deliver excellent results and make ourselves indispensable to you.

Competitive advantage

We help accounting firms achieve business development success. We offer print, electronic and in-person resources for firms that want to improve their business development results. "Replacing the Rainmaker" is a practical book full of step-by-step processes. It's supported by a series of online workshops, which are available on-demand. In addition, we offer in-person consulting services if you need assistance implementing the ideas in the book and workshops.

Short elevator pitch

I help accounting firms achieve business development success. My ideal client is an accounting firm that wants to implement sustainable practices to make business development a firm-wide priority. I work with firms of all sizes, but my prototypical client is a firm with at least three partners, 30 employees and \$3 million in annual revenues.

Long elevator pitch

I help accounting firms achieve business development success. My ultimate goal is to help firms instill a commitment to business development that permeates their entire organization, from their newest hire to their senior partners. I offer an array of resources, including a book, online workshop series and in-person consulting services. Put together, I offer firms everything they need to implement sustainable practices that will ensure their long-term prosperity. I work with firms of all sizes, but my ideal client is an accounting firm with at least three partners, 30 employees and \$3 million in annual revenues.

ISBNs (issue, solution, benefit narratives)

Issue	We know we need to do more business development but we don't know where to start.
Solution	We make it easy to provide business development training to your entire firm. We offer 41 workshops that cover messaging, marketing, networking, prospecting, sales, niche development and more. A typical workshop lasts one hour and includes an audio presentation, two in-class activities, a continuing education assignment and a quiz. Each workshop comes with an accompanying workbook and any relevant forms and spreadsheets.
Benefit	You don't have to develop your own business development training program. We've done it for you. You benefit from our years of experience. We're sharing tried-and-true ideas that work.

lssue	We're overly reliant on the efforts of a small segment of our partner group to bring in the majority of new business to the firm. We don't know how to make business development a firm-wide priority.
Solution	We believe that business development needs to be reframed as a firm-wide priority. As a result, our content addresses everything from how to give a presentation to how to generate more business from existing clients. We provide a comprehensive training program that's suitable for everyone from your newest hires to your senior partners.
Benefit	Your employees will start business development training from their first day on the job. You'll build a team of experienced business developers, and when your senior business developers retire, you'll enjoy the peace of mind of knowing that you've successfully trained your next generation of business developers.

Issue	We want to make business development a firm-wide priority but we can't afford the time or money to make
	it so.
Solution	We offer an incredibly affordable way to provide business development training for your entire firm. For a
	45-person firm, the per-person annual cost is less than \$170 for the entire workshop series.
Benefit	Our workshop series costs less than comparable in-person training and consulting services, while offering
	an unmatched level of depth. You'll learn more and pay less.

Issue	We know we need to become more "specialized," but how do we decide which services and industries to specialize in?
Solution	We offer a series of workshops that focus on how to develop a niche. These workshops detail how to choose your niche and how to get your niche off the ground.
Benefit	You'll be following tried-and-true practices for developing a niche. You'll know exactly what's required to succeed in niche development.

Issue	How do we create a business development-centric culture in our firm?
Solution	We offer a series of workshops on developing a business development-centric culture. We offer workshops on coaching, mentoring, crafting a compelling saga and more. All these workshops offer specific advice for instilling a commitment to business development across your firm.
Benefit	If you follow our advice, you'll foster a sense of teamwork within your firm. Your employees will start engaging in the types of business development behaviors you want to see. You'll reap the benefits in terms of increased revenues and greater employee satisfaction. You'll be confident knowing you're well positioned for the future.

Issue	How do we identify potential business developers in our firm?
Solution	Everyone has the potential to become a great business developer. They just need the chance to develop the
	right skills. Our workshops will help everyone at your firm develop the skills they need.
Benefit	You'll realize business development benefits up and down the firm as everyone learns what they can do to
	contribute to your business development success.

Issue	As compliance work becomes increasingly commoditized, how do we diversify to make ourselves more		
	valuable to our clients and more profitable for the long haul?		
Solution	The best way to escape the commodity trap is to become your client's most trusted advisor. We offer a		
	number of processes aimed at learning more about your clients and uncovering new ways to serve them.		
Benefit	You'll know exactly what you have to do to ensure your long-term success. We'll guide you step by step through strengthening your client relationships. Your clients will stick around for the long haul because you will have demonstrated your value time and again.		

Issue	The schedule and seasonality of our work makes it difficult to commit to group trainings. How does your		
	program account for this reality?		
Solution	You license the workshops for a year and you can watch the content anytime and anywhere.		
Benefit	You'll be able to plan your business development training so it doesn't conflict with your busy periods. Our		
	content will be there for you when you need it. Staff members can watch workshops on their own or as part		
	of a group, making it easy to plan around individual schedules.		

Opening paragraph

Replacing the Rainmaker helps accounting firms achieve business development success. We offer an array of resources, including a book, online workshops and in-person consulting services, all of which are accounting-focused and include specific processes to put ideas into action. Put together, we provide firms with everything they need to ensure their long-term prosperity.

Closing paragraph

Replacing the Rainmaker is committed to helping our clients achieve business development success. We'll do everything we can to exceed your expectations, deliver excellent results and make ourselves indispensable to you. For more information, please visit our website (ReplacingTheRainmaker.com) or contact us at Info@ReplacingTheRainmaker.com.

EMAIL SIGNATURE

Replacing the Rainmaker's email signature adheres to the following convention:

Ian Tonks, MBA President Replacing the Rainmaker Phone: 415-801-2661 Direct: 415-685-4421 Fax: 415-801-2668 Mobile: xxx-xxx-xxxx Email: xxx@xxxx.com Web: ReplacingTheRainmaker.com

Follow us on Facebook Connect with Ian on LinkedIn Watch us on You Tube

Note: Be sure to include web links to Facebook, LinkedIn and You Tube online pages.

To follow instructions to create a signature line in Outlook visit: <u>http://www.howtogeek.com/173548/how-to-create-a-new-signature-in-outlook-2013/</u>

IMAGES

Primary branding image



Secondary images

Secondary Replacing the Rainmaker images are used predominantly in our Workshops and can be accessed by contacting Replacing the Rainmaker. The following illustrates the 14 chapter heading images from the book, "Replacing the Rainmaker":



Sources of new business



Clients



Marketing



New clients



Referrals



Sales process



Niches



Allegiances



Culture



Non-organic growth





Networking



Prospective clients

SAMPLE DOCUMENTS

The following documents show visual examples of this style guide's parameters:

Sample form in Microsoft Word

REPLACING RAINMAKER	Meeting report summary	Three things you would do differently to improve your performance next time: 1. List here 2. List here Next steps Proposed next steps to move the sales process forward: 1. List here 2. List here
Prospective client name		3. List here
Meeting date		
Individuals present		
Goal statement		
Quantitative Score each outcome on a scale 1 Strongly agree 2 Jagree 3 Neutral 4 Disagree 5 Strongly disagree	of 1 to 5 according to the following key:	
Competition Client has shared the concer Client has clearly defined the Client has provided a list of o Decision-making Client has clarified who makk Client has provided the criter Client has defined next steps	Ir current situation ctors to achieve goals he firm is expected to play in achieving goals ns they have with their current/prior service provider capabilities the winning service provider must have	
Qualitative Positives Three things you did well: 1. List here 2. List here 3. List here Concerns Three things you didn't do well: 1. List here 2. List here 3. List here Recommendations		1 2

Sample form in Microsoft Excel





Sample PowerPoint presentation title slide



Sample PowerPoint presentation content slide



Sample letterhead

The Replacing the Rainmaker letterhead is simply the Replacing the Rainmaker logo (exact size shown below) placed in the upper left-hand corner of an 8.5×11 document that has .5 margins all around.

