

# Marketing Habits Checklist



Use this resource to benchmark your on-going marketing activities against a best practice checklist. Schedule follow-up in three months to review what still needs to be completed.

An explanation of how to implement each idea follows the checklist.

	Now		In 3 mths	
	Yes	No	Yes	No
<b>STRATEGY</b>				
Marketing plan with measurable outcomes reviewed regularly				
Offsite strategy meeting hosted once a year				
<b>CLIENT MARKETING</b>				
Monthly client newsletter sent via email				
All clients know about all of your services				
Clients are contacted about new services				
Process to regularly ask clients for testimonials				
Clients identified for case studies once per quarter				
Email blasts sent to clients at least once per month				
<b>REFERRALS</b>				
Clients are actively asked for referrals				
Network of referral partners				
<b>EVENTS AND NETWORKING</b>				
Attend networking events that target prospects				
Run educational client events				
Schedule webinars and online meetings				
<b>CUSTOMER SUCCESS</b>				
Client catch up meetings occur on a regular timetable				
New leads are contacted within 24 hours of their enquiry				
<b>SCHEDULING</b>				
Time is scheduled for marketing each week				
Social media posts published each week (e.g. LinkedIn, Facebook)				
Thought leadership content created and posted monthly				

## Marketing plan reviewed regularly

In order for your marketing to work, you need to set measurable outcomes that you can review to determine how successful your strategies are. Rather than being vague, such as “write more posts” give quantifiable outcomes, such as “write one blog post a week”.

Be sure to review your marketing plan regularly to see what’s working and what’s not.

## Review quarterly goals regularly

Review your quarterly marketing goals regularly to determine if your strategies are working or need to be revised. Furthermore, a simple scorecard can help you track how your ongoing marketing efforts are performing. Focus on the numbers like new leads, new email subscribers, sales meetings and conversions to new clients.

## Offsite strategy meeting

At least once a year you should bring your team together, outside the office. It’s a good time to discuss your company goals, marketing strategy and share your vision. There are many known benefits of this type of meet-up, including boosting employee morale, increased motivation and better meetings due to reduced distractions of the office.

## Contact clients about new services

If your clients don’t know about your new services, it’s harder to upsell. Make use of email newsletters, blasts, phone calls, webinars, events and your regular catch ups to ensure they’re aware of all the ways you can help them.

## Monthly client newsletter sent via email

Email is one of the most efficient and effective ways to stay in touch with your clients. A newsletter featuring a round-up of information that’s relevant and timely for your clients will highlight your expertise and keep them informed. It will also help establish a relationship with other partners and potential clients.

## Implement a process to regularly ask clients for testimonials

Unfortunately, this step is often ignored, but social proof from testimonials is helpful in encouraging prospects to sign up with you. Send an email asking happy clients to write you a testimonial. If clients send you an email expressing gratitude without your prompting, ask them if you can use their words in a testimonial on your website.

## Identify clients for case studies

Once per quarter you should identify which clients will be a suitable candidate for an in depth case study. This content should be a deeper dive into what the clients’ pain points were and how you helped solve them. Use this content on your website and in your marketing to show other businesses how you help.

## Client events

Running your own events, such as webinars, information evenings, client-only sessions, and Q&As showcases your expertise and highlights you for new prospects. It also expands your network and helps you market yourself.

# Marketing Habits Explanations

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## Email blasts sent to clients at least once a month

Email blasts are typically done with the goal of persuading the reader to take some sort of action. That action can be purchasing your services, or it can be downloading information, subscribing to a blog, or attending a special event. Types of email blasts include welcome emails, to welcome a new subscriber or client; retention emails to engage with current clients and encourage repeat business; and promotional emails alerting readers to special events or offers.

## Actively ask clients and partners for referrals

We suggest you ask clients for referrals regularly. You could ask in your regular meetings, over the phone, in your next email newsletter and even in a dedicated email campaign. It's helpful to tell clients that you enjoy working with them and want more clients like them (particularly if you serve a niche). Consider connecting with other professionals who also work with your ideal clients (e.g. bankers, financial planners, lawyers). If you work with a niche, make sure you tell them.

## Meet with clients regularly

Monthly, and even quarterly, meetings can come around fast, but they are worth it. You get to see how your clients are doing and deal with problems much faster. You can also use these meetings as an opportunity to upsell other services and ask for referrals.

## Invest time into marketing

You need to allocate time to marketing. If you don't you can't expect to build a successful business, get new clients or keep your existing customers happy. Marketing lets people know who you are and what you do, but you must do it regularly. Even if you outsource the implementation part, you/your company should be responsible for setting the strategy and direction.

## Thought leadership articles

We recommend you regularly release articles that showcase your authority in your field. This type of content is a great way to demonstrate your expertise, keep your website and social media pages fresh and stay top-of-mind with your audience. You should aim to post this type of content at least once per month.

## Need help growing your firm?

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