

Marketing Coaching Checklist

Marketing Assessment

- Marketing Coaching Intake Completed** and Reviewed
- StrengthsFinder Test Results Completed** and Reviewed
- Myers Briggs Type Indicator Test Results Completed** and Reviewed
- Strategic Marketing Questionnaire Completed

Marketing Plan Development

- 2.5 hour Marketing Planning Session Completed
- Marketing and Growth Objectives Defined
- Target Audiences Identified
- Key Messages and Practice Brand Messages Developed
- Ideal “A-Level” Client Defined
- “A-Level” Referral Source Defined
- Target Market / Niche Determined

Pillar I – Retain and Grow Existing Relationships

- Client Satisfaction Processes in Place
 - Client Service Methods Refined
 - Clients are Fully Utilizing All of the Firm’s Services
 - Referral Source Tool Completed and Reviewed
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Pillar II – Develop New Business

- “Elevator Speech” Created
- E-Mail Introduction Paragraph Created
- Pipeline Tracking System – and Number of Networking Meetings per Week/Month Set
- Networking Meeting Agenda / Structure Reviewed = Introductions
- Qualifying Process / Questions to Ask in Networking Meetings
- Qualifying Process / Questions to Ask in Sales Meetings
- Trade Association / Chamber Group / Board Determined (and level of involvement)
- Proposal Process Refined
- Marketing Call Planner in Use

Pillar III – Increase Name Recognition and Awareness

- Individual LinkedIn Profile Updated
 - Facebook and LinkedIn Company Pages Created
 - Social Media Integrated on Website
 - Thought Leadership / Content Marketing in Place
 - Blogging Discussed and Planned
 - Social Media Aggregator Implemented
 - Social Media Posting Calendar in Place
 - Community Involvement and Board Memberships Discussed
 - Advertising Opportunities Discussed
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- Targeted Media Outlets Identified
- Story Ideas Ready to Pitch to the Media

Pillar IV – Pursue Targeted Communications

- Strong Branding In Place (Logo, Materials, Letterhead, Business Cards, Sell Sheets)
 - Digital Media Checklist Completed and Reviewed
 - Website Bio Reviewed and Updated
 - Website Effectiveness Audit Completed
 - New or Enhanced Web Presence if Required
 - Marketing Database in Place (Highrise, Constant Contact, Campaigner)
 - Marketing Communications Planned for the Year
 - Client or Contact Events in Place
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