

Quarterly Audit of Marketing/BD Activities

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1. Are you spending 15-30 minutes a day on marketing or relationship building (on average)?
2. Are you reading articles and social media posts with purpose and forwarding links to your contacts as appropriate?
3. Are you actively looking for ways to be helpful to your contacts and referral sources?
4. Are you mailing to all of your contacts at least once per quarter?
5. Have you written at least one article or blog post per month that highlights your expertise (i.e. either an original piece or a reaction to, or summary of, someone else's presentation or article.) *The point is to create practical materials that you can send to your contacts (to remain top of mind and reinforce your niche).*
6. Have you given a presentation or webinar to an industry group, civic organization, or prospective client this quarter (on a subject that highlights your expertise)?
7. Are there any recent matters you've worked on that should be added to your bio or LinkedIn profile?
8. Are there any recent matters you've worked on that you should mention when you give your "elevator pitch"/"infomercial"?
9. Have you identified at least 20 A List contacts (clients, prospective clients or referral sources who you believe might have work for you or who may be able to refer work)?
10. Are you actively looking for ways to build your relationships with these contacts (e.g. having conversations with at least two contacts per week either by phone, Zoom or in person)?
11. Before you meet with prospects/contacts/referral sources, are you taking the time to do research so you can anticipate some of their needs?
12. Are you coming to networking meetings prepared to answer the question "What's new" (i.e. can you speak briefly about a recent matter that highlights your expertise?)
13. When you are in networking meetings or speaking to a new contact by phone or Zoom, are you listening 80% of the time and asking probing questions to identify problems that you can help that individual solve?
14. Are you making referrals to your referral sources or sending them resources to help them address the issues they raise?
15. Are you setting next dates/next steps in your calendar so that you remember to circle back to your A list contacts?
16. Are you posting something on LinkedIn at least twice a week (i.e. your content or sharing someone else's content with a few sentences of commentary)?
17. Are you involved in community, industry, professional or recreational activities that enable you to continue to develop new contacts (i.e. individuals who may turn into clients or referral sources) and further solidify relationships with existing contacts?



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