

## **Self-Assessment: Is My Marketing Telling My Story** *(and to the right people)?*

Marketing, communications, public and media relations, client service and business development – these all go hand-in-hand. Are your activities in each of these areas well-coordinated and supporting your business in alignment with your goals? Are there areas that, with just a little nudge, you could be seeing greater impact? Do your tools and activities support your brand or are they tired and in need of a refresh?

Following are a number of areas, posed as statements, which you can use to reflect on whether your current marketing, public relations and business development activities are meeting your strategic goals. Your responses to the same statement may be different when viewed through the lens of your overall firm, practice or business unit, or individual goals. You may want to take the assessment separately from each of those perspectives and see how well aligned the responses are. At the firm or practice level, consider asking others in the company to take the assessment independently (or at least parts of the assessment, especially in the brand, marketing communications and website areas) to see if your responses are similar. We find that once you start looking at the following areas more closely, there is often low-hanging fruit well within your grasp that can help support your business development efforts.

### **Taking the assessment**

The following statements are intended to provoke thought and, sometimes, more questions. As you assess each area, you might want to make notes regarding questions or thoughts that occur to you. For example, is there a particular area where you feel you could do more if you had the right technology or administrative support to assist you? Is there a new opportunity that you could develop or promote based on external drivers, such as new legislation or market conditions? Perhaps working with a consultant or coach to plan or execute sustained activity would help you realize your goals. Each question you ask yourself has the potential to open a new door for your business. So, dive in, be honest with yourself about what you know (and what you don't know) and get curious.

*Rank each of the following statement based on a scale of 1-10 (1 = least alignment with your goals and expectations and 10 = most alignment). Once you are done, you should be able to identify areas to focus next steps.*

### **Business Development**

- \_\_\_\_\_ I have a clear understanding about the ideal client persona of my services.
- \_\_\_\_\_ I have a deep understanding of how clients first learn about my business.
- \_\_\_\_\_ I am engaged in the right external activities to feed my business.
- \_\_\_\_\_ Outside of client work, I regularly (be honest) connect with clients and former clients.
- \_\_\_\_\_ I have a consistent system for adding quality new contacts to my network.
- \_\_\_\_\_ I have regular and frequent contact with my top five prospective clients.
- \_\_\_\_\_ I have regular and frequent contact with my top five referral sources.

## Marketing Communications/Branding



- \_\_\_\_\_ I *know* (not just hope or guess) how my firm is perceived in the market.
  - \_\_\_\_\_ My firm name and logo reflect the business as I want it to be perceived.
  - \_\_\_\_\_ My firm's branding stands out in comparison to my direct competitors.
  - \_\_\_\_\_ My firm communicates a consistent, clear message to the market about our services, values or other differentiators.
  - \_\_\_\_\_ My firm's brand is highly visible to our target audiences.
  - \_\_\_\_\_ My firm does an appropriate amount of advertising directed to the right people to stay visible to our target audiences.
- My public facing marketing materials (website bios, brochures, business cards, etc.) are:
- \_\_\_\_\_ Current – with my most recent representative work, affiliations, and credentials updated
  - \_\_\_\_\_ Well-written to support the kind of work I currently do and would like to do more of in the future
  - \_\_\_\_\_ Visually compelling – showcasing my firm and practice in a user-friendly manner

**Website:** My site was last updated (select one\*):

Within the past 2 years

10+ years ago

2 - 4 years ago

What website?

5 - 10 years ago

*\* Any site older than 5+ years should be reviewed for possible updates.*

- \_\_\_\_\_ My website reflects the business as I want it to be perceived.
- \_\_\_\_\_ My website's content is current and well written.
- \_\_\_\_\_ Images (including pictures of professionals) are current and modern.
- \_\_\_\_\_ My website is built to meet current best practices, including for:
  - \_\_\_\_\_ SEO/online search
  - \_\_\_\_\_ ADA accessibility standards
  - \_\_\_\_\_ Easy navigation for visitors to find exactly what they need
  - \_\_\_\_\_ Avoiding dated or cliché imagery



## Public/Media Relations

- \_\_\_\_\_ I leverage industry and news trends to showcase my expertise and services.
- \_\_\_\_\_ I have built a reputation for thought leadership in my field and promote this position of authority as much as I would like, including in the following specific ways:
  - \_\_\_\_\_ Speaking at relevant industry events
  - \_\_\_\_\_ Publishing byline articles in industry outlets
  - \_\_\_\_\_ Providing commentary to media for stories in my subject matter area
  - \_\_\_\_\_ Publishing on a firm-hosted platform(s), e.g., blog, podcast, etc.
  - \_\_\_\_\_ Publishing on outside platforms, e.g., industry blogs, podcasts, etc.
- \_\_\_\_\_ My firm's spokespeople are fully trained on how to effectively respond to and manage media inquiries.
- \_\_\_\_\_ My firm has a crisis communications plan in place that everyone knows how to activate.
- \_\_\_\_\_ I am fully prepared to use media tactics in support of my client engagements as appropriate (for example, to support litigation).

## Social Media

For most firms and individual professionals, LinkedIn is the primary social media platform, but for some marketing plans, it may be valuable to also engage on Twitter, Facebook, Instagram or other platforms. Consider each of these networks as they related to your individual goals.

- \_\_\_\_\_ My social media accounts have current and complete profiles that tell my story.
- \_\_\_\_\_ My "About" section uses a personal voice that shares the value of working with me.
- \_\_\_\_\_ I actively use social media to add people to my network.
- \_\_\_\_\_ I actively use social media to engage with my network.
- \_\_\_\_\_ My firm/I have a strategy regarding the content frequency and themes we post.
- \_\_\_\_\_ I leverage my company's social media accounts as a springboard for individual posting.

*For the following, simply indicate any areas that you would like to explore more deeply.*

### Client Service Programs:

Client satisfaction or feedback programs (e.g., surveys, client interviews).

Cross-selling or cross-servicing initiatives between professionals or practices.

Succession planning strategies – marketing and media relations support

Recruiting strategies – marketing and media relations support



### **Training/Coaching:**

Social Media (LinkedIn for Business Development)

Networking in a time of Physical Distancing

Media Training

Writing to be read

Presentation skills training (for in-person and virtual presentations)

Marketing & BD Strategic Planning (for individual, practice group or firm)

Custom programs to engage your professionals in marketing/BD initiatives

**I have the following additional questions or ideas related to promoting my business:**

### **Conclusion**

As you reflect on each of the areas above, consider whether you have the interest, willingness and resources to raise your “score.” Which areas are critical to presenting your business in the best possible light and what would it take for you to move the needle on your business development goals? In some cases that might mean looking to partner with a trusted service provider. In other cases, simply breaking tasks down into smaller bite-sized steps set to a regular schedule might be enough to see serious progress. In any case, building and maintaining your business requires ongoing care and nurturing.

### **About Blattel Communications**

Founded in 1990, Blattel Communications is a marketing and public relations firm working exclusively with professional services businesses. Our services fall into three main categories: communications (including PR & media relations, social media, crisis communications, and litigation support), marketing strategy and support (including advertising, events, branding and websites), and business development (including firm wide, practice group, and individual strategy and coaching). [www.blattel.com](http://www.blattel.com)

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