



## marketing activity checklist

Need some ideas on marketing activities you can incorporate into your marketing plan? Here is a Marketing Activity Checklist. Review the list to see which marketing activities are of particular interest to you.

- Be technically competent
- Learn the services offered by your firm
- Attend firm-sponsored functions
- Promote good client relations
- Know the history of your firm and be able to tell a brief summary of the history
- Prepare a professional biography of yourself to be included with proposals and promotional materials
- Participate in training sessions covering communication skills, marketing, sales skills, client service, etc.
- Keep informed about clients and communicate positive, negative or other “newsworthy” information to the directors and employees of the firm
- Meet regularly with other professionals from the firm whom you wouldn’t normally meet with or take to lunch to discuss their clients, marketing activities, etc.
- Make suggestions to existing clients on new services that they would benefit from
- Contact clients on a regular basis
- Develop potential clients/referral sources and contact them on a regular basis
- Monitor and track your contact and results on a monthly basis
- Whenever possible, support clients by referring business to them
- Follow up (within 2 weeks) with clients on new service opportunities and with prospective clients regarding new work



## marketing activity checklist (cont.)

- Learn more about and get involved in clients' industries, professions, etc.
- Send thank you letters to referral sources for their referrals
- Participate and regularly attend at least one civic, professional or charitable organization
- Assist in practice development assignments, such as attendance at trade fairs, help with proposal, prepare research on prospective clients
- Take a leadership role in civic, professional or charitable organizations
- Meet with clients, their attorneys and bankers
- Establish closer client relationships by actively networking with client contacts outside of work (civic, sports or other activities of interest to them)
- Develop a positive marketing attitude and take an active interest in others' marketing activities and encourage them to strive for more
- Represent your firm at special public events and private functions
- Develop written professional development goals for yourself