

# Integrating Marketing Into Your Daily Practice

## Achievable Tasks to Help You Grow Your Practice

1. Develop a simple, easy to follow goal sheet (example attached).
2. Write out all marketing actions in very specific language. On your goal sheet, write (for example) "Call Pat Stanley by April 20 and ask how their company is doing with the roll out of their new audit software.", instead of "call Pat Stanley".
3. Book time in your calendar at least once per week to focus on some aspect of marketing. Don't cancel the appointment. If you find the efforts are easy for you after you've consistently met your initial goals, you can consider increasing the frequency of your efforts.
4. Put a reminder note in your calendar to follow up with your contacts to see what they did with your advice. (See item #2 for how to do that.)
5. Start small and stay focused. e.g. don't ask yourself to contact 25 clients in a week; focus on three per week. Make the goal reasonable and you are more likely to hit your target.
6. Have an objective for every phone call or meeting and write out your objective – it will help you to stay on track. Before you pick up the phone or go to a meeting, clearly think through what it is that you want to have accomplished by its conclusion, then anticipate how the call will go and possible snippets of conversation. Write these down if you want to have something to refer back to as you're speaking.
7. Broaden your definition of marketing to go beyond just looking for new clients. Think of it as what you are able to do to help (and add value to) your existing clients and their businesses. **Eighty percent of your new business will come from existing clients with whom you have already established relationships.**
8. Ask your clients whether you are meeting their needs and expectations. When you learn of areas in which you can improve, **MAKE THOSE CHANGES**. If you can't do it, clearly explain why to the client and offer an alternate solution. No one appreciates being asked for advice and then having their advice disregarded.
9. If finding time to incorporate marketing into your weekly (or daily) routine is a challenge, adjust how you work. Value your time and learn to delegate and/or say 'no' to work that someone more junior, or better qualified, can do.
10. Work with your local marketing professional to get assistance on developing a marketing plan and scenarios that work for you.
11. You didn't become a professional overnight, so don't expect to become a successful marketer overnight. Build the habits into your daily routine so that it becomes automatic over time, and don't give up when you fall behind, just be willing to start again with small, achievable goals.

**Tip:** Your likelihood of success increases when you have face to face contact with the client/prospect. The next best methods to communicate are, in order:

1. videoconference
2. phone call
3. email
4. written notes (thank you notes, invitations to lunch, etc.)
5. written letters

