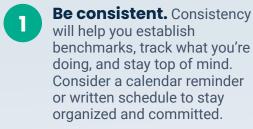


Ready to dip your toe into marketing or evolve what you're currently doing? We've got a few simple dos and don'ts to help you along the way.

DO's

DON'Ts





Know your audience. Define who you want to work with so you can leverage the channels and deliver the information most likely to

address their needs.



Refresh your website. Aim for a full redesign every 3-5 years and a routine review of copy, links, and imagery every 6-12 months.



Publish your thoughts. Whether a self-published book, a blog, social media posts, or videos – share what you know.



Define what makes your firm special. Know why clients work with you versus competitors and showcase those attributes across your materials.



Show your appreciation. Build connections with clients by sending thank you notes, birthday cards, holiday greetings, and quick notes just to check in and say hello.



Be authentic. Be genuine and personable to build better, longer-lasting relationships and engage more deeply.



Ask your clients what they want. Understanding your clients' values, expectations, and needs can help you narrow your focus to what really matters.



Embrace technology. Save time and resources by leveraging technology that makes sense for your skill level, budget, and capacity -



whether a CRM, a social media management tool, or an email management system.



Update your headshot. Your headshot makes a first impression and should best represent who you are. Update it every 2-3 years.



Start without a strategy. Outline your marketing goals (make sure they're measurable!) and a few ways you plan to

achieve them. This will keep

you on course and help you

determine what's working.



Try everything. Stay focused on a few key tactics and measure what you can before jumping into new ideas that could be distracting.



Aimlessly follow trends. Always consider your target audience, resource capacity, and strategy before trying something just because it's

popular or working for

someone else.



Expect overnight results. Launching something new will take time to gain traction. Give your audience time to catch on and yourself time to optimize what you're doing.



Rely only on the phone. Leverage various channels to best meet your clients where they are - email, phone, virtual events, in-person events, etc.



Ignore the data. Forget your gut, look at the data to determine what's really working and how you're tracking against your goals.



Be overly aggressive or **spammy.** Your clients want to hear from you consistently, but not everywhere and all the time. Their time is valuable too, and you don't want to create a negative association.



Worry about perfection. Expect to make mistakes, everyone does. Over time, you'll learn, improve, and enhance everything you're doing.



Stop learning. Marketing best practices change, client expectations shift, new platforms emerge - don't expect what you're doing today to work forever.



Do it all alone. Whether an in-house resource or an agency partner, someone with true marketing experience can help ensure greater success and free up your time.



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