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Marketing Dos & Don'ts

Harbor 

FOR ADVISORS

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

- 1 Be consistent.** Consistency will help you establish benchmarks, track what you're doing, and stay top of mind. Consider a calendar reminder or written schedule to stay organized and committed. 
- 2 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. 
- 3 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. 
- 4 Publish your thoughts.** Whether a self-published book, a blog, social media posts, or videos – share what you know. 
- 5 Define what makes your firm special.** Know why clients work with you versus competitors and showcase those attributes across your materials. 
- 6 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. 
- 7 Be authentic.** Be genuine and personable to build better, longer-lasting relationships and engage more deeply. 
- 8 Ask your clients what they want.** Understanding your clients' values, expectations, and needs can help you narrow your focus to what really matters. 
- 9 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. 
- 10 Update your headshot.** Your headshot makes a first impression and should best represent who you are. Update it every 2-3 years. 

DON'TS

- 1 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. 
- 2 Try everything.** Stay focused on a few key tactics and measure what you can before jumping into new ideas that could be distracting. 
- 3 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. 
- 4 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. 
- 5 Rely only on the phone.** Leverage various channels to best meet your clients where they are – email, phone, virtual events, in-person events, etc. 
- 6 Ignore the data.** Forget your gut, look at the data to determine what's really working – and how you're tracking against your goals. 
- 7 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. 
- 8 Worry about perfection.** Expect to make mistakes, everyone does. Over time, you'll learn, improve, and enhance everything you're doing. 
- 9 Stop learning.** Marketing best practices change, client expectations shift, new platforms emerge – don't expect what you're doing today to work forever. 
- 10 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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