
The Marketing and Business Development Self-Assessment Quiz for Professional Service Providers: *How am I Doing?*

Take this short quiz for a high-level take on how your current marketing and business development (BD) efforts measure up. Of the essential marketing and BD activities below, give yourself one point for each you are currently doing well. This quiz is equally applicable to individuals and firms (simply change "I" to "My firm") but regardless of whether you are assessing your own efforts or those of your firm, a well-rounded marketing program will check most of the boxes. When done, check your score and find out what else you could be doing to build your brand and develop new business!

The Basics

- I have a marketing plan (and stick to it)
- I have a realistic marketing budget (and monitor it)
- I schedule time on a regular basis to actively market my business
- I have well-defined, measurable goals for my marketing and BD activities
- My services and areas of expertise are clearly defined so I can communicate them effectively to prospective clients
- I clearly communicate the benefits I offer to prospective clients as opposed to simply listing my experience
- I know a lot about my closest competitors and keep tabs on what they're doing
- I can articulate my competitive advantage(s)
- I have identified my target market(s), their needs, and the different types of personas in each
- I successfully get my marketing messages out into my target markets
- I have developed an effective brand strategy that conveys who I am and my unique place in the market

The Nuts and Bolts

- I know where my target market gathers and attend select networking events to strengthen personal connections
- I regularly analyse my networking activities to ensure I'm getting a good return on my time and dollar investment
- I effectively leverage my memberships in industry organizations
- I regularly submit bylined articles to industry publications and speak/present at events relevant to my prospective clients
- I offer seminars, webinars and/or podcasts to help prospects get to know me
- I communicate with my current and prospective clients on a regular basis
- I have up-to-date collateral material that effectively communicates my brand
- My website is a useful tool that offers real value at all stages of the sales cycle
- My site is appealing, easy to navigate and content is updated on a regular basis
- My site is optimized to rank well when prospective clients are searching me online (a.k.a. SEO)
- I regularly create content to share with my clients and prospects, using a content calendar to plan and manage my content to ensure I stay on track
- I always repurpose my content across channels, such as my website and social media
- My social media accounts are properly branded and send a clear message consistent with that of my website
- I have identified discrete services or subsets of services that could be marketed with traditional lead generation techniques, such as advertising and SEO
- I have considered potential advertising vehicles that could cost-effectively reach my target market (print, digital, radio, national, local)
- I have a mailing list that is kept up-to-date
- I regularly ask for client feedback to confirm I'm providing excellent client service
- I communicate with my current and potential clients on a regular basis to share information that showcases my knowledge, reliability, and trustworthiness

The Results

- I use technology to help me reach, track, analyze, and follow up with leads
- I use website forms and dedicated phone numbers to uniquely identify leads from my site
- Using analytics, I periodically review the client-acquisition costs of each of my marketing tactics and adjust my plan to get the best marketing ROI
- I continuously benchmark my marketing efforts to know I'm moving forward
- I regularly follow up with everyone involved in my marketing (e.g., employees, contractors, suppliers and vendors) to ensure we're all on the same page and my marketing program stays on track
- I am spending a reasonable amount of time on marketing and business development, am having fun doing it and seeing results!

Scoring:

Use this scoring guide as an indicator of how well you and/or your firm are doing on marketing and business development. While this is by no means an exhaustive list of strategies and tactics, we've included some of the basics that should be part of every professional services marketing program. Feel free to contact us should you have any questions!

30-35: Congratulations, you've got this! You are well on your way to an effective marketing and business development program. The challenge for you now may be improving your marketing ROI by lowering your client acquisition costs (in both time and dollars).

20-29: You've got a good handle on your marketing and business development. Some additional support, both human and technical, may be needed to propel your program to the next level.

10-19: You may be covering some of the basics, but more work is needed to effectively stake your position and stand out in the marketplace. Brand building and effective communication should rise to the top of your to-do list.

Below 10: You've taken the right first step by completing this quiz! With some strategic insights and tactical guidance you can begin work on the basics of an effective marketing and business development program and build up from there.

Download our **[6 Keys to Marketing Success for Professional Service Providers](#)** and learn how to overcome some of the biggest challenges professional service providers face in their marketing efforts.

Want help increasing your score?

Contact us if you'd like to improve your marketing ROI while spending less of your own time marketing. Sales Renewal's JointSourcing Pro™ works with professional service providers to maximize their investment of both time and money for marketing and business development activities to achieve measurable results.

What is JointSourcing Pro?

JointSourcing Pro by Sales Renewal is a complete, one-stop marketing program for professional services firms. JointSourcing Pro ("joint venture" + "insourcing" + "professional services") provides everything you need: all the people and technology, management and strategy needed to develop and implement a custom marketing program. JointSourcing Pro does it all and takes the burden of hiring, managing and paying for a team of in-house or third party marketing experts off your shoulders.

With an emphasis on the more "personal" marketing strategies (including thought leadership, expertise marketing, relationship building, social media, brand building, video, and more), JointSourcing Pro is the marketing solution professional services firms have been looking for. Learn more here or call us at (855) 232-5838.