



Marketing Self-Diagnostic	YES	NO
1. Does your firm have a written marketing plan?		
2. Do all your marketing tactics have measurable goals linked to business outcomes?		
3. Does your firm maintain a robust database of clients, prospects and referral sources?		
4. Do you communicate directly with all target audiences at least quarterly?		
5. Does all your public-facing content position your firm as a “safe choice” by decision-makers?		
6. Does your firm showcase its intellectual capital in a non-self-serving manner?		
7. Does your firm receive earned media exposure that’s at least equal to its competitors?		
8. Does your firm monitor and leverage analytics from its website and social media?		
9. Is your firm’s content optimized to benefit from online searches?		
10. Are your marketing efforts closely aligned with your firm’s sales strategy?		

SCORING (Total Number of “Yes” Responses)

1 - 5 = *Seriously Deficient*

5 - 8 = *Missing Significant Opportunities*

8 - 10 = *Likely to be Successful*