

Find New Customers Checklist



Date:

Use this resource to benchmark your on-going marketing activities against a best practice checklist. Schedule follow-up in three months to review what still needs to be completed.

| | Done | |
|--|------|----|
| | Yes | No |
| Write a marketing plan | | |
| Review your marketing plan | | |
| Set a marketing budget | | |
| Review quarterly goals | | |
| Define your ideal customer | | |
| Create a unique selling proposition (USP) | | |
| Design a customer-focused website | | |
| Use pay-per-click (PPC) advertising | | |
| Blog regularly | | |
| Leverage social media | | |
| Network locally | | |
| Participate in trade shows or industry events | | |
| Collaborate with complementary businesses | | |
| Offer webinars or workshops | | |
| Speak at events | | |
| Use email marketing | | |
| Invest in email marketing software | | |
| Create a lead magnet | | |
| Offer a loyalty program | | |
| Run promotions or contests | | |
| Ask for referrals | | |
| Send a monthly client newsletter via email, encourage recipients to share it | | |
| Write thought leadership articles | | |
| Implement a process to regularly ask clients for testimonials | | |
| Write and publish case studies | | |

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Write a marketing plan

Your marketing plan allows you to clearly define your target audience, ensures consistency in your messaging, and enhances your brand recognition. Additionally, it sets out the metrics you'll track and gives you measurable ways to refine your strategies and strengthen your efforts to find clients. Your marketing plan includes a description of your ideal customer, your marketing budget, where you'll focus your marketing efforts, the language you'll use, and what your marketing goals are.

Review your marketing plan

In order for your marketing to work, you need to set measurable outcomes that you can review to determine how successful your strategies are. Rather than being vague, such as "write more posts" give quantifiable outcomes, such as "write one blog post a week".

Set a marketing budget

While some of your marketing can be done for free, it helps to have money set aside for various activities. Setting a budget enables you to control your costs and prevent overspending, allocate money to the marketing activities that are highest priority and bring in the best results, and identify the best channels for you to market on.

Review quarterly goals regularly

Review your quarterly marketing goals regularly to determine if your strategies are working or need to be revised. A simple scorecard can help you track how your ongoing marketing efforts are performing. Focus on the numbers like new leads, new email subscribers, sales meetings and conversions to new clients.

Define your ideal customer

Identify the type of person who would most benefit from your product or service and who you would most like to sell your product or service to. Include details about their demographics, habits, interests, and other traits that will help you set your marketing strategy.

Create a unique selling proposition (USP)

Your unique selling proposition is what sets you apart from your competition. It highlights why clients will buy from you rather than from others who have similar products or services. This might be related to your price point, the quality of your goods or services, your expertise, your commitment to the community, or anything else that makes you different from the rest.

Design a customer-focused website

Your website markets you, 24 hours a day, 7 days a week. It's where clients and customers can go to learn more about you and your business. Your website should be easy to navigate, visually appealing, and clearly state how you help your customers. It should focus on their needs and pain points. Make sure you use keywords so new customers can easily find you.

Use pay-per-click (PPC) advertising

Online ads can be a fantastic way for your business to increase its reach and find new customers. Various platforms offer pay-per-click advertising, in which you pay only for the number of people who click on your ad to visit your website or landing page.

Blog regularly

Regularly creating valuable content that answer's your audience's question and provides value for them can improve your website's SEO, highlight your expertise, and give customers a reason to keep coming back to your website. Additionally, it can help your business stay top-of-mind for when your customers need you and it gives new customers another way to find you when they search for you.

Leverage social media

Once you've identified your ideal clients, you'll have an idea of which social media platforms they use. Create accounts on those platforms and regularly post engaging and valuable content that would be of interest to your audience. Be sure to interact with your followers and consider paying for social media ads to increase your reach.

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Network locally

Local networking events can be a great resource for finding new clients. Attend local events, join business associations, and get to know other businesses and service providers in your area. Consider hosting a local networking event if you have the capacity for it. The relationships you build at these events can easily lead to referrals and new customers.

Participate in trade shows or industry events

Face-to-face interactions are still incredibly powerful. They give you the chance to see your potential clients up close and engage in meaningful conversations with new customers. You have the opportunity to showcase your products or services, conduct live demos, hand out samples, establish relationships, and network with other business owners, industry leaders, and professionals.

Collaborate with complementary businesses

Partnerships with businesses that offer complementary products or services can introduce your business to new potential clients. You each open your customer base to your collaborator, which can lead to increased business for you both. For example, a writer and graphic designer might partner up to refer business to each other, or a wedding planner and florist could join forces. Artisan bakeries and coffee shops could also collaborate on ways to serve their customers.

Offer webinars or workshops

Webinars and workshops can help demonstrate your expertise to a wider audience and gives you the opportunity to provide value for your existing customers while attracting new customers. Be open to answering questions at the end of your webinar or workshop and make sure everyone in attendance sees your contact information.

Speak at events

Industry conferences, local business events, and other relevant gatherings provide a fantastic opportunity for you to showcase your expertise and establish you as a leader in your field. You'll find potential new customers and clients, and you may even create opportunities to partner or collaborate with complementary businesses.

Use email marketing

Email marketing is a powerful tool you can use to nurture your existing customers and find new ones. Use a lead magnet to build your email list, develop tailored content geared to the various needs of the people on your list of subscribers and create engaging content with compelling subject lines. Encourage your current subscribers to share your emails with their friends or family.

Invest in email marketing software

Running email campaigns can take a lot of time and energy, especially if you have highly segmented lists. Rather than managing it all yourself, invest in software that can be set up to manage your email lists, design emails, automate your campaigns, and provide analytics into how your email marketing is performing. It can also ensure you remain compliant with any email marketing laws.

Create a lead magnet

Lead magnets are used to motivate potential customers to share their contact information. Among the lead magnets you can use to collect email address are white papers or industry reports, free consultations, exclusive content, discount codes, guides, checklists, templates, or access to a private forum.

Offer a loyalty program

Loyalty programs encourage repeat business, but they can also attract new business. A well-run loyalty program with valuable benefits can create buzz about your business and motivate customers to refer their friends or family to you. Loyalty programs might include points systems, cash back programs, punch cards, or even tier systems.

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Run promotions or contests

A well-run contest can engage your audience and attract new customers to your business. Social media contests often extend your audience reach and increase engagement with your brand, while promotions or discounts encourage new customers to try your product or service.

Ask for referrals

Your current happy clients and customers are your best source for new business. They'll share information about all the great work you do with their network, who in turn are more likely to trust you because they know someone who will vouch for you. Consider offering a referral program to encourage customers to refer their friends and family to you.

Send a monthly client newsletter via email, encourage recipients to share it

Email is one of the most efficient and effective ways to stay in touch with your clients. A newsletter featuring a round-up of information that's relevant and timely for your clients will highlight your expertise and keep them informed. It will also help establish a relationship with other partners and potential clients.

Write thought leadership articles

We recommend you regularly release articles that showcase your authority in your field. This type of content is a great way to demonstrate your expertise, keep your website and social media pages fresh and stay top-of-mind with your audience. You should aim to post this type of content at least once per month. You can also take your articles and repurpose them as emails, social media posts, and checklists.

Implement a process to regularly ask clients for testimonials

Social proof from testimonials is helpful in encouraging prospects to sign up with you. Send an email asking happy clients to write you a testimonial. If clients send you an email expressing gratitude without your prompting, ask them if you can use their words in a testimonial on your website.

Write and publish case studies

Once per quarter, identify which clients would be a suitable candidate for an in-depth case study. This content should be a deeper dive into what the clients' pain points were and how you helped solve them. Use this content on your website and in your marketing to show other businesses how you help. Once the case study is published, announce it in emails and on your social media.