

## Create a Value Proposition

# Marketing checklist

Start building your brand — and your practice today

Marketing may not be your top priority, but it's necessary. Knowing how and where to apply your value proposition could set you apart from your competitors.

Now that you've created your unique value proposition let's apply it to your practice — as many places as we can. This checklist will help you track your progress.

### Immediate Actions

#### In Person

\_\_\_\_\_ **Elevator Speech/  
Networking Events**

It's important to verbally convey your value proposition succinctly. So write it down and practice it. You're no longer just an "advisor."

\_\_\_\_\_ **Phone**

Set the tone with new clients — and reinforce your value proposition with existing clients — by using it when you or your staff answers the phone.

\_\_\_\_\_ **Client Meetings**

Use it to introduce yourself and/or close meetings to help set yourself apart.

### Traditional Marketing/Business

\_\_\_\_\_ **Email**

Consider adding your value proposition to your email signature and use it in email responses, etc.

\_\_\_\_\_ **Staff Bios**

### Online

\_\_\_\_\_ **Social Media Profiles**

LinkedIn and Facebook are ideal platforms to include your value proposition — do this in the Summary or About You sections.

\_\_\_\_\_ **Social Media Content**

Align any content you're sharing on social media with your value proposition to help support and reinforce your position in the digital space.

## Short-term Actions

### Traditional Marketing/Business

#### Newsletters

Add to your newsletter header or within a sidebar or graphic to reinforce what you bring to the table.

#### Signage

Consider including it on letterhead, within logos and other signage you have in the office.

#### Requests for Proposal (RFPs)

In business correspondence, particularly in any RFPs, where you can really differentiate yourself with key stakeholders and prospective clients.

### Online

#### Website

Make it a prominent feature on your web page and consider including it within an “About Us” page or other pages where it makes sense.

## Long-term Actions

### Traditional Marketing/Business

#### Culture

Engrain your value proposition into your company culture so that your staff knows and lives it.

#### Service Model

Your staff plays a critical role in delivering your value proposition (your promise to clients). So work with them to ensure their service mirrors the value you want to provide.

#### Staff Competencies & Skills

When hiring, use your value proposition to help identify desirable traits that meet or align with your value proposition, then hire those people to reduce training time.

Applying your value proposition will take time and effort, but it will be well worth it. Remember, it will help you better define and articulate your core business offerings, which, in turn, will help you better target (and attract) more clients.



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