

2023 Must-do Marketing Activities Checklist



1. Update Your Social Media Profiles

Social media is one of the first places prospects will encounter your brand – especially if your channels are active. Ensure your brand is presented well with the following updates:

- Ensure your profile picture is personable, with a well-lit, professional photo
- Include a banner that reflects your personal brand. Create it for free using Canva
- Use your “About me” to tell your professional story in the first person, not as a resume
- Schedule a number of posts ahead of time using supporting social media tech

2. Deliver the Unexpected

Surprise and delight clients with personalized marketing activities, using the data gathered in your CRM to do the following:

- Write and schedule thoughtful check-in emails on timely, personalized topics
- Show you’re thinking of them with emails triggered by date-based planning opportunities
- Plan your event strategy by scheduling activities based on common client interests

3. Go All-in on Video

Video is not just in demand. It’s a method of showing who you are and what you do – it’s your brand in a nutshell. Here are some must-do’s to get the most out of your video strategy:

- Tell your story; who are you and your team? Give watchers something to connect with
- Cut the script. Create a bullet list of questions and have a team member ask them to you
- Clearly define your audience, and think from their perspective during recording
- Record each video with purpose, not because it’s popular. What is your end goal?

4. Refresh Your Website

Your website is the foundation of your brand. Ensure it’s a strong one with these tips:

- Clearly define and understand the needs of your target audience(s)
- Align design, copy and services with audience needs to ensure prospects are qualified
- Prioritize your about us page – people are most interested in who they will work with

5. Map Out Your Monthly Content

The content you create influences all other marketing channels, be thoughtful to see success.

- Outline your monthly content schedule to hold yourself accountable
- Define success and measure results over time