




The Visible FirmSM

Online Workshop:

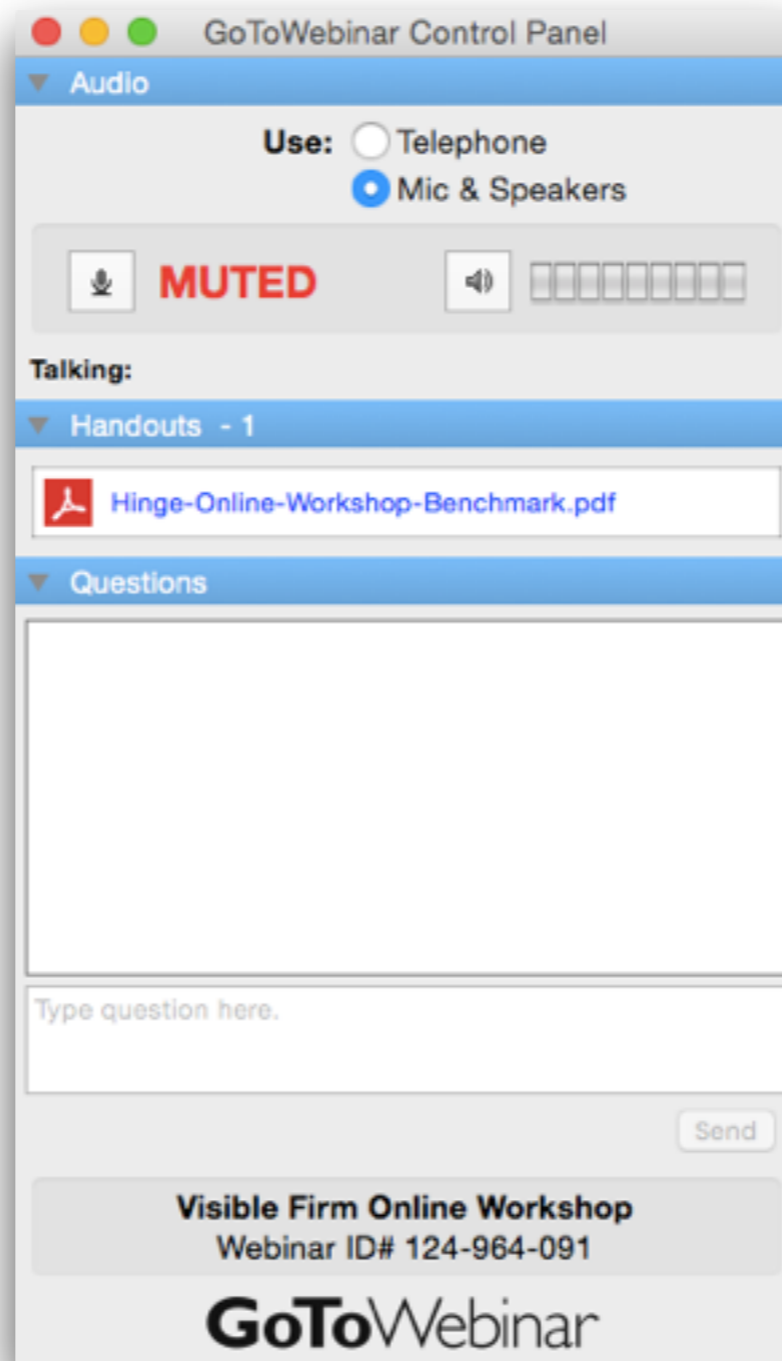


Benchmark Your Firm



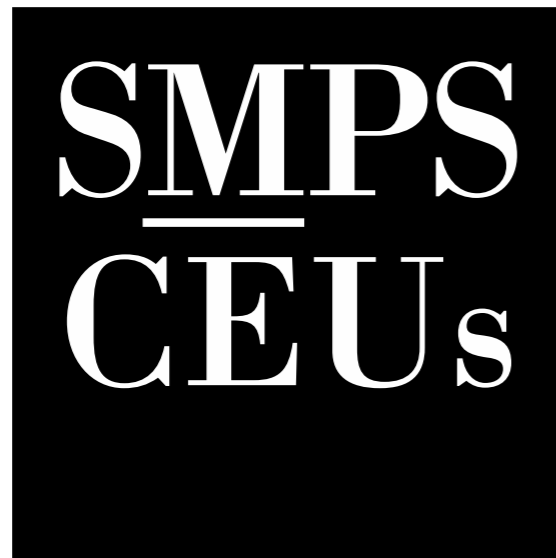
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Workshop Instructor



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The background of the slide is a photograph of a sky. At the top, there is a clear blue sky. Below it, a faint rainbow is visible, stretching across the frame. The bottom half of the image is filled with soft, white and grey clouds. The overall lighting is bright and airy.

The Visible Firm

A firm that has attained high visibility and a reputation for expertise in their industry niche.

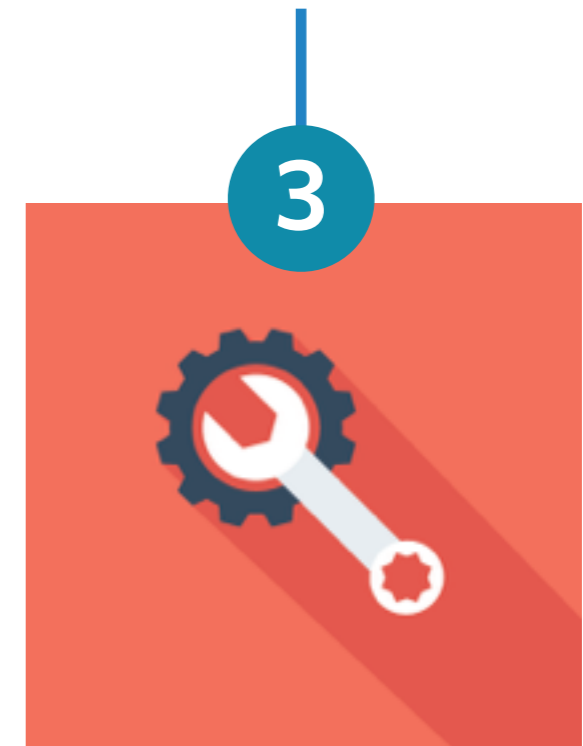
The Benefits of a Visible Firm

- More opportunity
- Easier to close
- Faster growth
- Higher profits
- Greater valuation

Phase 1. The Strategy



Phase 3. The Rollout



Phase 2. The Build

The Importance of Benchmarking

- What are your key strengths?
- Where do you need to improve?
- How do you stack-up against the best firms?

Six Key Areas to Benchmark Your Firm

- Marketplace profile
- Expertise
- Visibility
- Business development
- Marketing infrastructure
- Impacts

1. Marketplace Profile

*Your firm has a clearly defined, limited in scope,
and well-articulated target audience.*



Your firm has a broad audience, across many industries, revenue sizes, and organizational roles.

Your audience is limited to multiple industries, firm revenue sizes, geographic markets, or decision-making roles. You may be concerned about focus.

Your firm has a clearly-defined, well-documented profile of a narrow target audience, including a target industry, revenue size, decision-making roles, key issues, and psychographics. This profile is well understood and widely enforced.

SCORE:

Your firm regularly does systematic, primary research on your target audience.

1

We don't feel the need to do research on our target audience.

2

We have done research on our clients, but don't do it regularly or frequently.

3

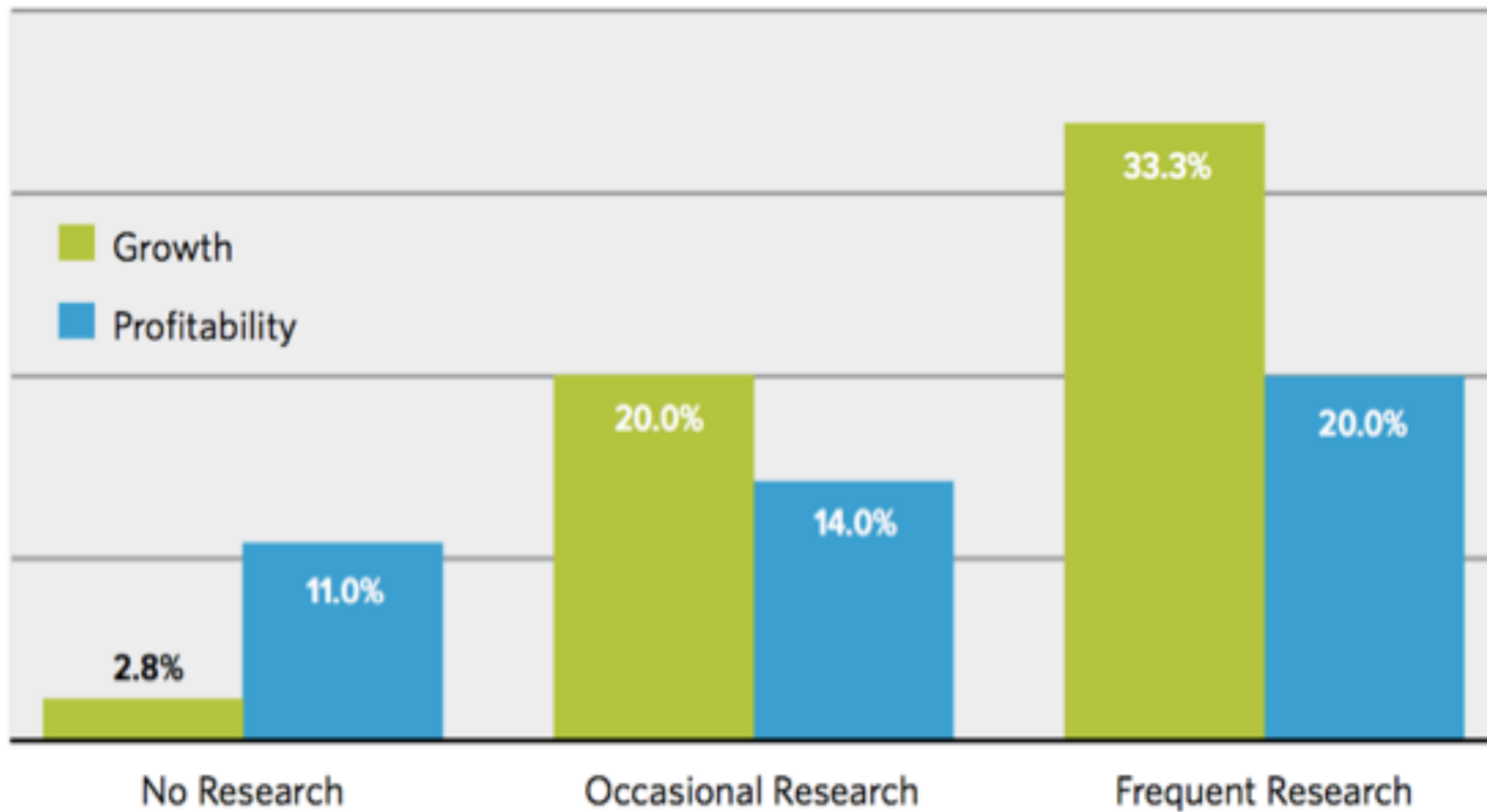
4

5

We conduct primary, original research on our target audience at least quarterly.

SCORE:

Impact of Research on Growth and Profitability



*Your firm has easy to understand,
believable, and provable differentiators
that are important to your audience.*



**We're not sure if
we have the right
differentiators.**

**We have differentiators
we believe are good, but
aren't sure because we get
a lot of pushback on price.**

**We're sure our
differentiators are
easy to understand,
believable, and
clearly important to
our audience.**

SCORE:

*You do not face growing competition
from powerful firms.*



**We do have increasing
competition from
powerful competitors.**

**We have growing
competition, but are
staying ahead of it.**

**We're recognized as the
market leader.**

SCORE:

*You have specialized solutions to issues
that are important to your clients.*



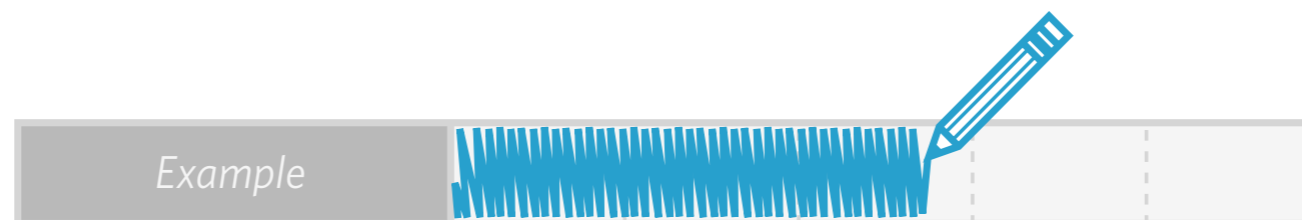
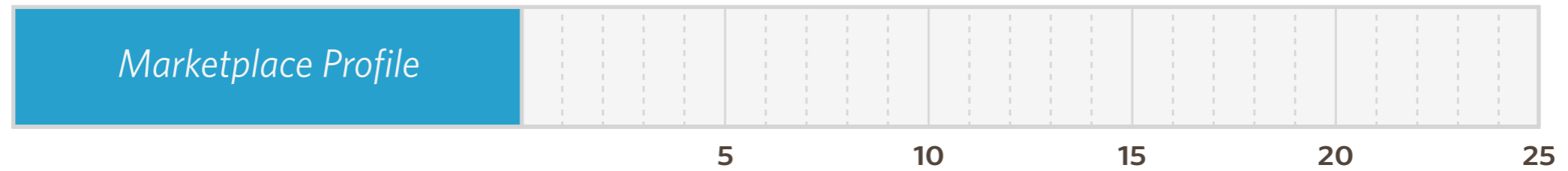
Our firm offers a wide
variety of services and
can address many issues.

We are specialized, but
other firms share the
same specialization.

We have very specialized
services and solutions
that no one else offers.

SCORE:

Total Your Marketplace Profile Score



*Your firm has nationally recognized experts
in the services that you offer.*



Our firm has experts
on staff recognized in-house
as the “resident” expert,
but not beyond the firm.

Our firm has experts
that are beginning to be
recognized on a regional
or national scale.

Our firm has one or
more nationally recognized
experts whose name is
known by almost everyone
in the industry.

SCORE:

Your firm or your experts have a book reflecting your specialized expertise.

1

We have not published a book.

2

We have published a book relevant to our industry expertise, but it is not a best seller or standard reference.

3

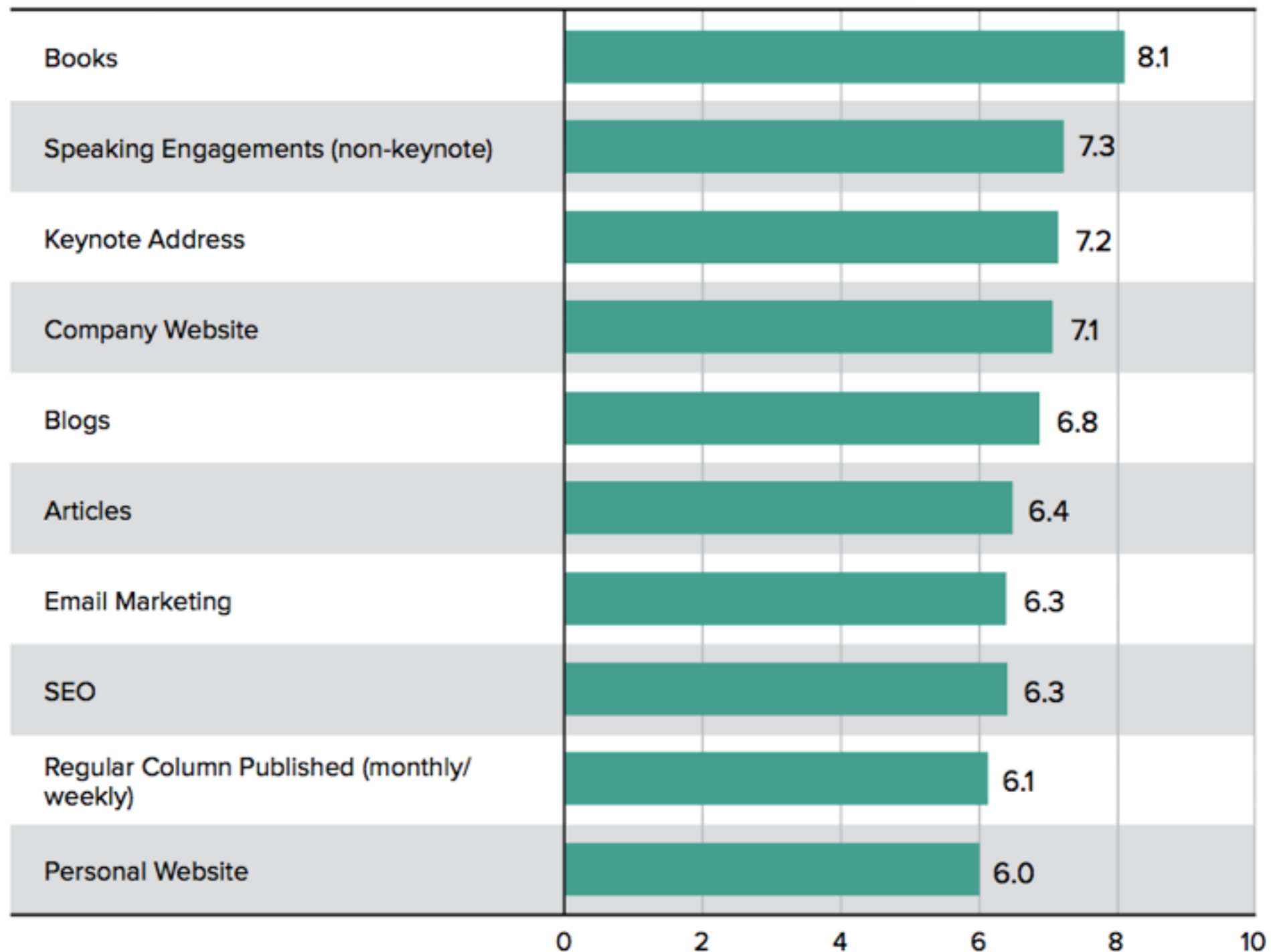
4

We have published a book relevant to our industry expertise that has achieved "best seller" status or is very widely recommended throughout our industry.

5

SCORE:

Tools and Techniques With the Greatest Impact



Your firm does original research in your area of expertise and/or on issues important to your clients, and is widely cited by industry publications and opinion leaders.



We do not conduct original research on our target area of expertise or on issues important to our clients.

We do original research, but it is not widely cited by peers or publishers.

Our firm is an industry leader and pioneer, conducting primary research on emerging industry trends or issues. Research by our firm is widely cited and referred to by industry peers and publications.

SCORE:

*Experts within your firm are invited
to do presentations and keynote addresses
to your target audience.*



We are not regularly
asked to do presentations
or keynote addresses.

We do some speaking
but need to evaluate
it and may not always
receive top billing.

Experts within our firm
are invited to give keynote
speeches at nationally
or internationally
recognized conferences.
They are THE go-to person
and command top billing.

SCORE:

*Your firm does regular, frequent blogging
and/or articles on your firm's blog.*

1

We don't post
blogs or articles.

2

3

We do it as often
as we can but not
every month.

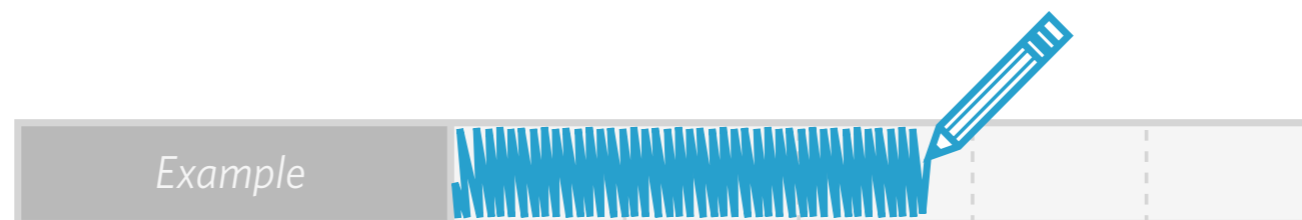
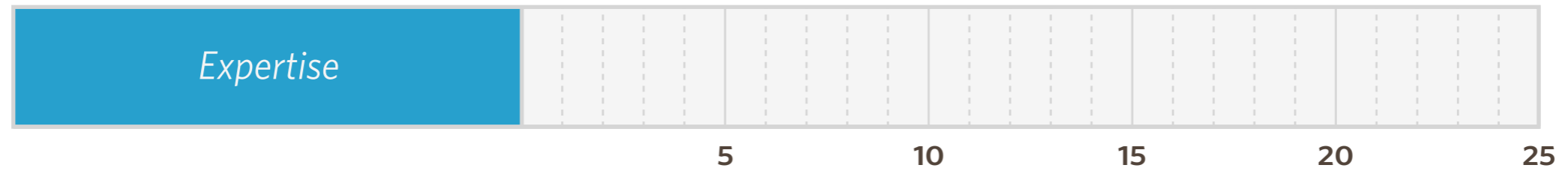
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5

Our firm or practice
posts a blog at least
once per week on our
firm's blog.

SCORE:

Total Your Expertise Score



Your firm incorporates Search Engine Optimization (SEO) best practices in your marketing and/or runs Pay Per Click (PPC) advertising campaigns.



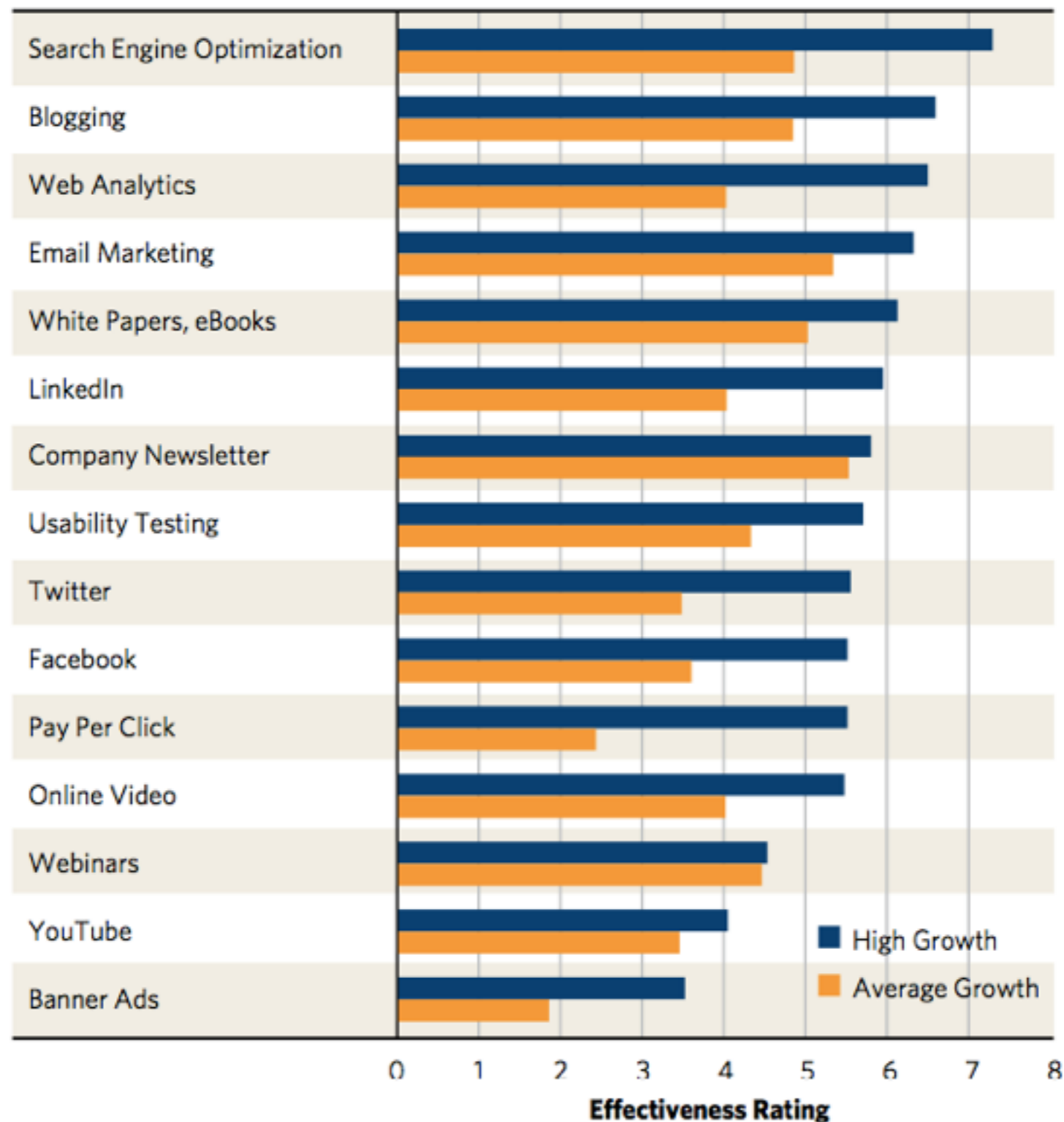
**We don't focus on
search engine rankings
or PPC advertising.**

**We have done SEO or
PPC but are not sure
we are seeing a positive
return.**

**We are heavily focused
on SEO and/or PPC,
monitoring it, and are
seeing a positive return.**

SCORE:

The Most Effective Online Marketing Tools



Your firm contributes guest blog posts or articles regularly to outlets (i.e., blogs, journals, magazines) read by your target audience.



**We don't contribute
blog posts or articles to
outside publications.**

**We do it as often as we
can but not every month
or not necessarily in the
right publications.**

**Our firm or practice posts
a blog at least once per
month in outside publications
read by our target audience.**

SCORE:

Your firm does regular, frequent webinars or other online events attended by your target audience.



**We don't host
any webinars.**

**We do as many webinars
as we can but the
frequency varies.**

**We do one or more
webinars each month.**

SCORE:

Your firm and professionals are active on social media followed by your target audience.



We are not active on social media.

**We post on social media about once per week.
We lack guidelines for professional engagement on social media on behalf of our brand.**

We post on social media daily. Professionals follow firm-wide social media guidelines and engage with our audiences on behalf of our firm's brand.

SCORE:

59.9%

of buyers check you out on **social media.**

Your firm is approached by business or marketing partners who want to work with your firm.



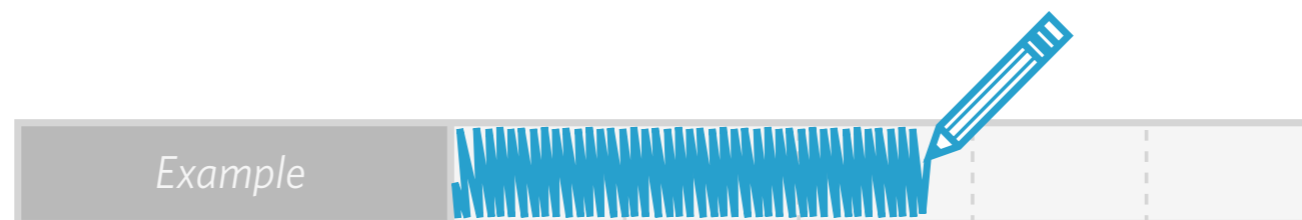
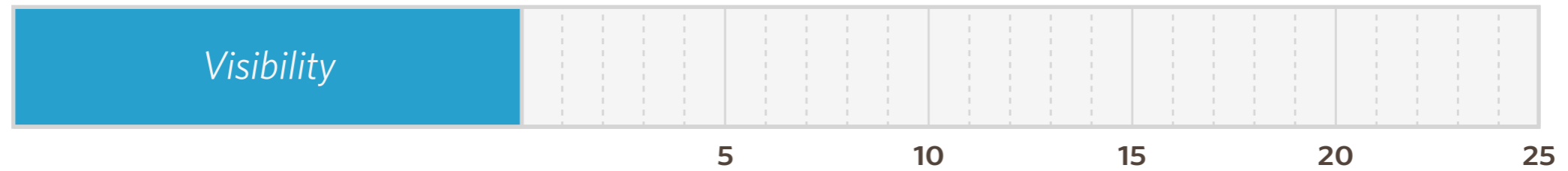
Partners do not approach us. We would need to approach them.

We both seek out and receive invitations for business or marketing partnerships.

We have no need to seek out business or marketing partnerships, they approach us. We can be highly selective with the partnerships considered.

SCORE:

Total Your Visibility Score



4. Business Development

Your firm offers formal business development or sales training for all professionals involved in developing new business.

1

We don't have formal business development/sales training.

2

3

We have some training, but not for everyone.

4

5

We have formal training for all client-facing professionals.

SCORE:

Your firm has a “funnel” or “pipeline” system that systematically qualifies prospects and moves them to higher levels of engagement. You regularly collect data on progress through the pipeline and make adjustments based on that information.



We don't have a formal, documented process for prospect qualification and development.

We have a general process, but we are not consistent in implementing it or tracking progress and results.

We have a formal, documented process that is consistently implemented. Data is tracked each week and adjustments are made based on the results.

SCORE:

Your firm has a regularly scheduled system of outbound communication with clients and prospects such as newsletters, emails or phone calls.



We communicate with clients and prospects from time to time but not consistently.

We have some regular communication, but not sure how well it works.

We have a well thought out program that is consistently implemented and is effectively tracked.

SCORE:

Your firm offers regular opportunities for substantive and insightful conversations with clients, prospects and/or teaming partners about their needs.

1

We have
conversations
as time allows.

2

We have plans,
but different people
approach it differently.

3

4

5

We have specific
offers for substantive
conversations with
prospects, clients,
and business partners.

SCORE:

Sales Winners vs. Runners-Up

Educated Me With New Ideas and Perspectives

A pink speech bubble with a white outline and a tail pointing towards the bottom left. Inside the bubble, the text "#1" is written in a large, white, sans-serif font.

#1

Winners!

A pink speech bubble with a white outline and a tail pointing towards the bottom left. Inside the bubble, the text "#42" is written in a large, white, sans-serif font.

#42

Runners-Up

Your firm has a standardized, repeatable process for producing compelling proposals.

1

Proposals are
done differently by
different people.

2

3

We try to be
consistent, but
quality varies.

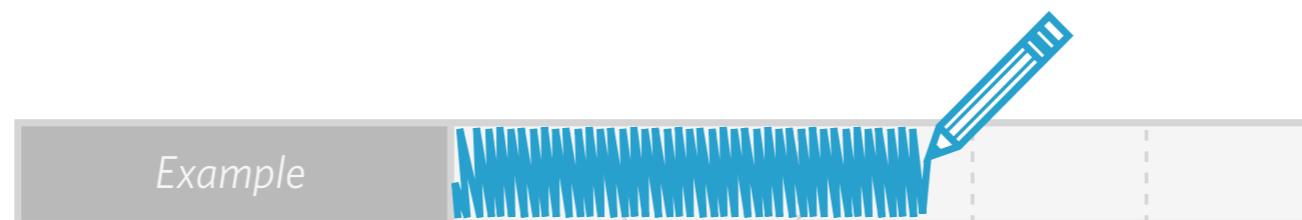
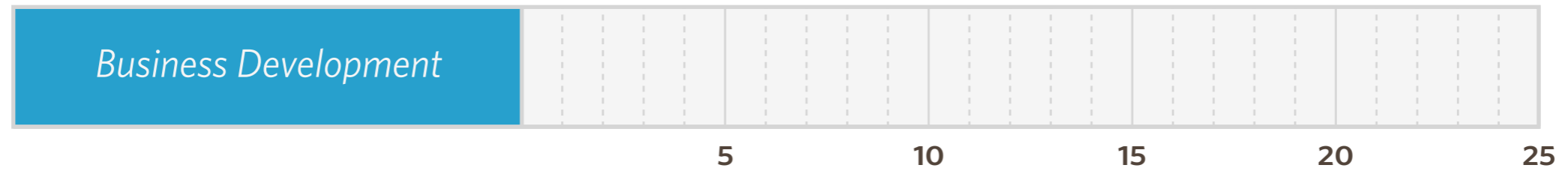
4

5

We follow
a consistent,
repeatable process
and produce
very compelling
proposals.

SCORE:

Total Your Business Development Score



5. Marketing Infrastructure

Your firm has a written brand positioning statement and specific messaging to each important segment of your target audience.



We don't have a firm-wide written brand positioning statement or formal messaging to each target audience.

We have a brand positioning statement in place but it may be outdated or incomplete.

Our written brand positioning statement incorporates relevant, believable, and provable differentiators and messages are tailored to clearly defined target audiences.

SCORE:

Your firm has a modern website that reflects your brand positioning and shows visitors how you can help them.



Our website is out of date and/or not very effective.

Our website is not bad, but it could certainly be improved.

Our website is modern, easy to navigate and mobile responsive. It reflects our brand positioning, and shows visitors what we do and how we can help them.

SCORE:

80.8%

of buyers *check out your website.*

Your firm has CRM/Marketing Automation tools that allow you to manage and track the impact of your efforts.



We don't have these tools.

We have some of these tools, but don't get the most from them.

We have these tools and use them to implement, track, and adjust our marketing efforts.

SCORE:

Your firm has accurate and up to date social media profiles for your firm and key professionals on all platforms widely used for business by your target audience.



Our firm isn't on social media.

Our firm has social media profiles set up, but are not updated regularly.

Our firm has active, robust social media profiles that reflect brand positioning and are updated frequently (at least weekly).

SCORE:

Your firm has compelling, up-to-date marketing materials, including video, explaining how you help your clients.



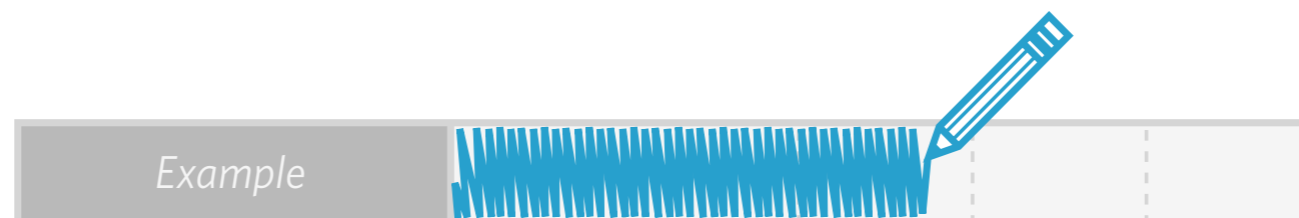
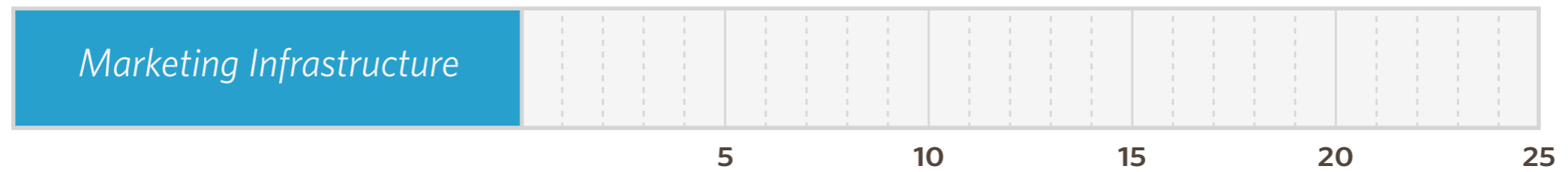
We have some marketing materials, but they are outdated or not of professional quality.

We have mostly up-to-date marketing materials that are of professional quality, but others are needed.

We have compelling, up-to-date marketing materials, including video, explaining how we can help our clients.

SCORE:

Total Your Marketing Infrastructure Score



Your firm has enough business leads seeking you out to allow you to be selective and maintain margins.

1

We could definitely use more leads and/or better quality leads.

2

We are consistent in lead generation or lead quality, but not both.

3

4

5

We have plenty of high quality leads and can be very selective.

SCORE:

Your new leads are educated about how you can help them and the key advantages of working with your firm.



We have to educate our leads about our services and value.

We have some leads that are well educated about our services and value.

Our leads are well educated and understand our services and the value we offer.

SCORE:

*Your firm is able to attract top talent
in sufficient numbers to support growth.*

1

Recruiting is a
challenge for us.

2

We have many good
candidates to choose
from for some positions,
but not for others.

3

4

5

We have many good
candidates for all
positions.

SCORE:

*Your firm is growing many times faster
than your industry as a whole.*



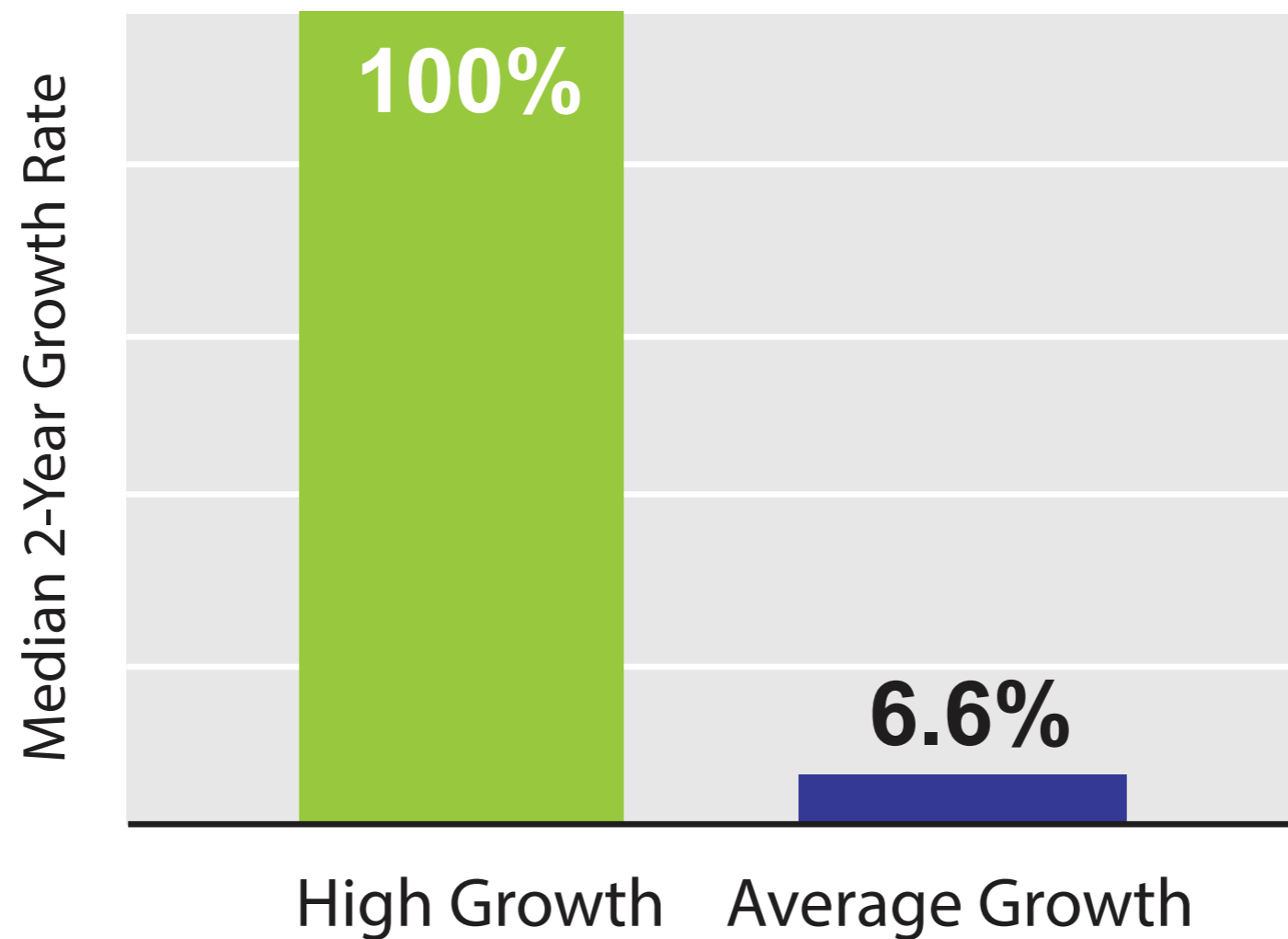
We are growing
slower than the
industry average.

We are growing
at about the
industry average.

We are growing
faster than the
industry average.

SCORE:

High-Growth vs. Average-Growth Firms



*Your firm is at least twice as profitable
as your closest competitors.*

1

We're less profitable
than the industry
average.

2

3

Our profitability is
at about the
industry average.

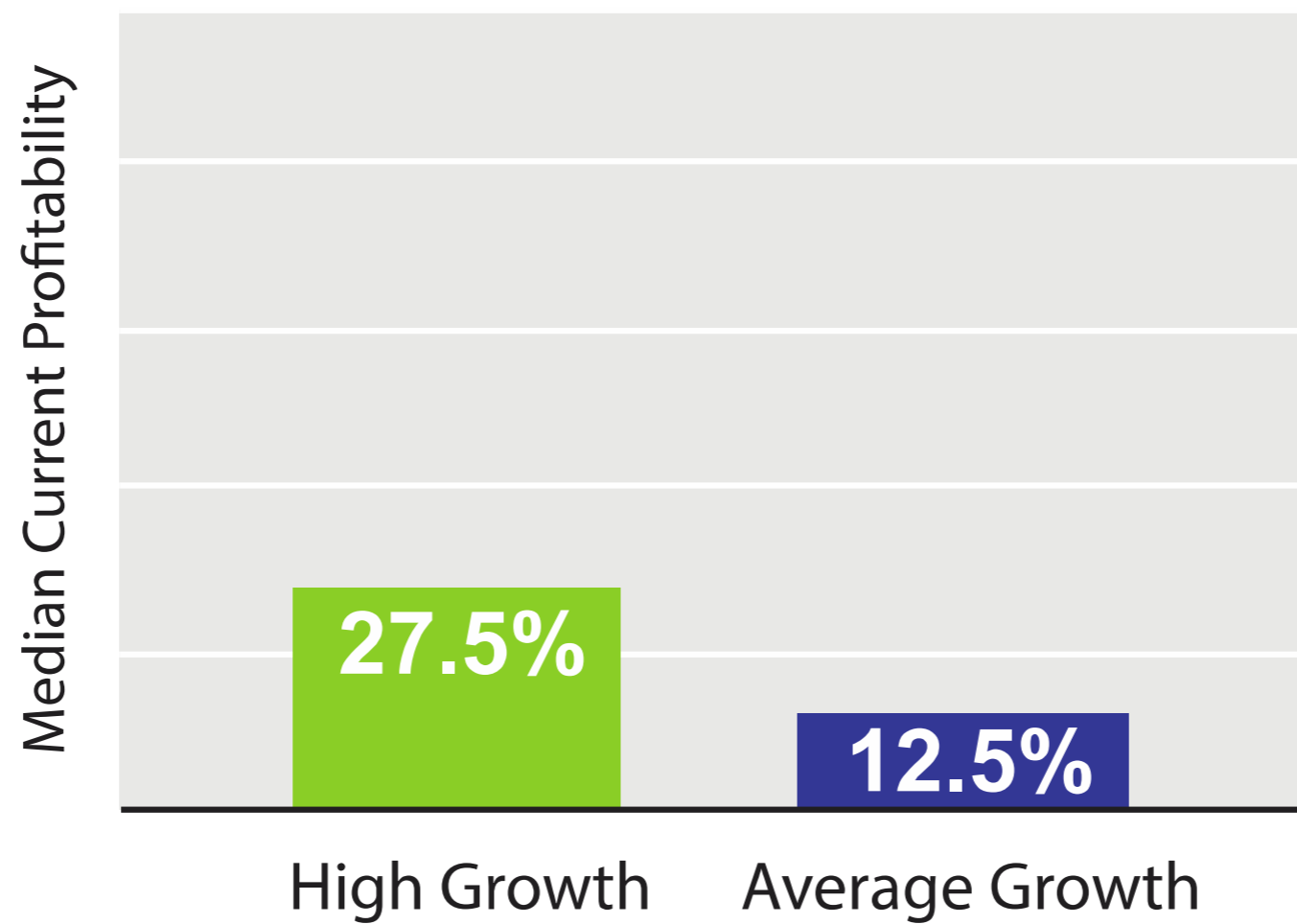
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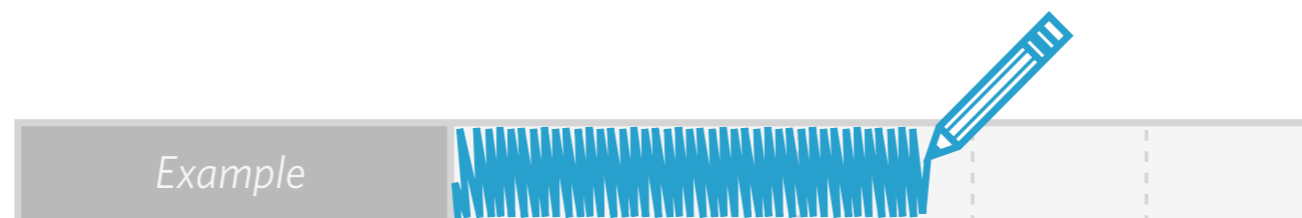
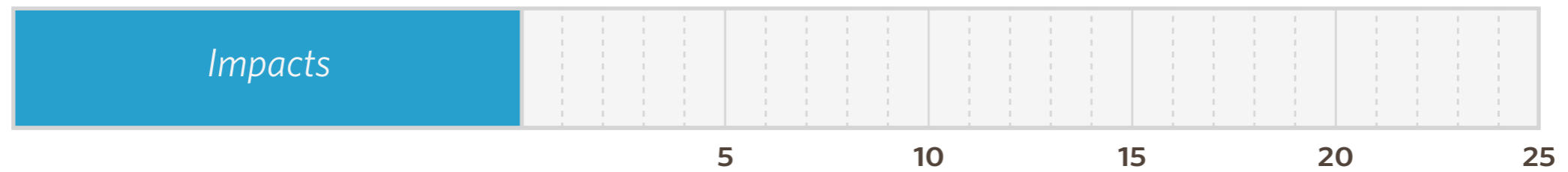
We're more profitable
than the industry
average.

SCORE:

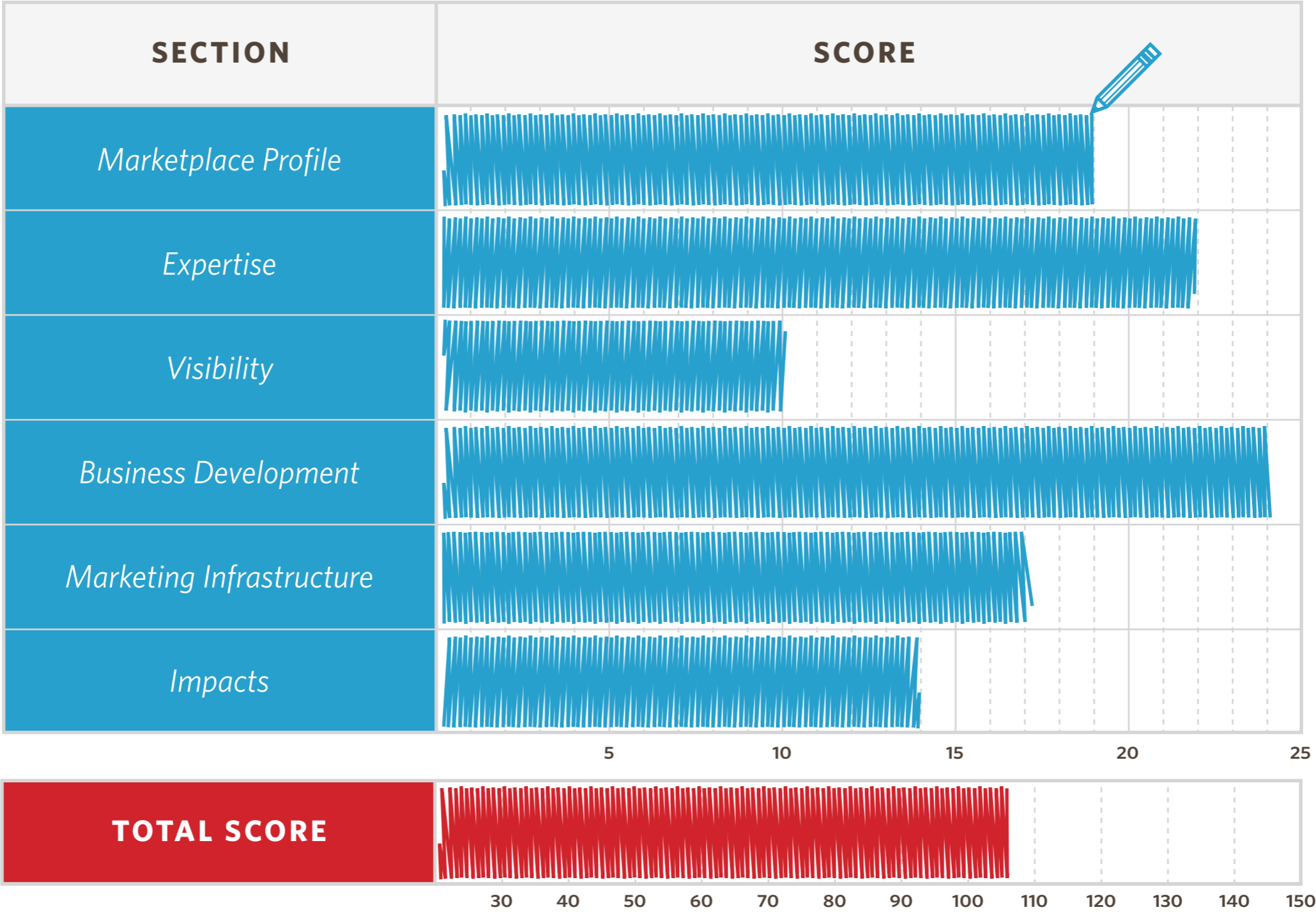
High-Growth vs. Average-Growth Firms



Total Your Impacts Score



Total Your Scores From All Six Sections



What Does Your Score Mean?

- **135-150** = The profile of your firm is characteristic of other high-growth firms that allow you to increase visibility, own a niche in the marketplace, and grow.
- **105-134** = Your firm is on the right track, but could improve in some areas.
- **104 and Below** = Your firm faces important opportunities to build your visibility and grow.

Phase 1. The Strategy



Phase 3. The Rollout



Phase 2. The Build



Join our next hands-on Visible Firm workshop.

How well do you know your audiences? Understand your firm's positioning in the marketplace using research.

Thursday, August 6 at 1:00pm EST

How?

Register at: goo.gl/erW9SX

Contact Info

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