



# Marketing your business



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## Defining who you are





**Your values: who are you and what do you stand for?**

You probably want to identify three or four core values that clearly outline what matters to you and your firm. Whether it's integrity, or committing to a jargon-free customer experience, identifying these values will help you shape your approach to communication and marketing. They will also provide you with a benchmark when it comes to measuring the alignment of colleague behaviours, customer interactions and marketing activity.

Do you want to be professional? Do you want to be friendly? Do you want to be an expert? Defining your tone of voice will likely be intrinsically linked to the qualities valued by your firm. So if you prioritise jargon-free interactions, your marketing and communications activity might sound different than if you prioritise detailed explanation. It's about finding the tone that really reflects who you are as a firm. And you might sound different in different interactions. Your client engagement letter will probably have a different tone than your monthly newsletter or your Facebook page, for example.



**Tone of voice: how do you want to pitch yourself?**



**Subject matter: what do you want to talk about?**

Once you understand your values and the tone of voice that helps you best express them, it's time to ask yourself: what do I want to be seen to talk about? For example, if you've identified that your firm is an expert, you might want to position yourself as a thought leader, discussing market trends in your blog and sharing insights in your customer newsletter. Alternatively, you might decide that your firm's core value is relatability, and you might adopt a more light-hearted approach to your communications, sharing relevant memes on your social media channels, or investing time in your website's 'About us' section.



## Understanding your audience



### Demographics: who are you targeting?

Depending on your firm's business model and growth strategies, you may be looking to target people of various ages, income levels and regional locations.

Take a look at your existing customer base and ask yourself, is this model sustainable? If you're a wealth firm and a high proportion of your customers are over 75, you might decide it's time to target a younger demographic. You might even decide you want to target the children of your existing customers.

Alternatively if you're a mortgage firm, you might identify that you want to engage your customers at the start of their property journey, to secure a customer for life, so you might want to target 20-30 year-olds.

Knowing the answers to these questions as your starting point will help you identify the approach you need to take to your marketing communications.



### Platforms: where will your audience find you?

Email marketing, social media, online blogging, local press, search engine position... opportunities for engagement are seemingly endless. But which are right for you and your firm?

Depending on the demographics you're targeting, you'll want to ensure your firm's brand is visible in specific places.

For example, if you're wanting to target customers in the 20-30 age bracket, your social media presence will likely look different than if you're wanting to target customers in the 40-50 age bracket.

You might even decide to tailor your social media platforms accordingly, employing one approach for Instagram and TikTok where you're more likely to find 20-30 year-olds, and another approach for Facebook and LinkedIn where you'll find higher concentrations of engaged Gen X users.

## Engaging your audience

### Proactive approach: 70-75% planned

While it's always recommended to have a plan in place that outlines your key customer touchpoints and the messages that will be visible at any one time, it's also important to ensure you can react to market trends, global events and customer needs when required.

### Agile by nature: flexibility built-in

Responsive marketing is effective marketing. Being able to adapt or change plans when needed to ensure your communications remain relevant for your audience and sensitive to their needs will help ensure your marketing is as impactful as possible.

### Cross-channel: communicating across a variety of platforms to remain front-of-mind

Being active across multiple channels at once is time-consuming. That's why it can be helpful to take one piece of content that clearly communicates one core message, and repurpose it to be shared across different channels. For example, you might share a video blog on your website, across your social channels, and in your email newsletter.

## Channels

There's a whole world of communication tools out there. Once you understand who you are, who your audience are, and how you'd like to engage them, you should be much clearer on the channels that are right for you and your business.



**Top tip:** if you're new to marketing, try identifying just three key channels to focus your time and energy.

Email

Website

Search engine

Leaflets and brochures

Webinars

Customer letters

Infographics

Regular newsletter

Social media

Blog

Video

Events

## Recommendations

- Define your brand values**  
Engage your colleagues, engage your customers – are your values truly reflective of who you are as a firm and as a brand?
- Reach out to your audience**  
Start the conversation. Share your expertise, your opinion and your message.
- Start with nil-cost activity**  
Get an idea of what works well for you and your business before investing in big marketing budgets for particular channels.