



# Checklist for adding a new pool of clients:

- ☐ Identify your new target
- ☐ Get to know as much as you can about the market or segment
- ☐ Don't go too far too far out of your comfort zone
- ☐ Analyze what services your staff can realistically provide
- ☐ Identify centers of influence
- ☐ Make referrals a priority
  
- ☐ Have a business development process in place
- ☐ Follow up every contact
- ☐ Offer your services as a subject matter expert
- ☐ Join local charities in a new market
- ☐ Get to know local business reporters
  
- ☐ Consider buying a firm to break into a new market
- ☐ Review your website
- ☐ Use LinkedIn
- ☐ Offer free educational events
- ☐ Solicit testimonials from clients