AXIAL
Business Development Checklist

MARKETING: Brand Presence & Reputation

Website Optimization
- ☐ Share transaction criteria
- ☐ Promote transaction history
- ☐ Include photos, bios, and firm history

Digital Profile Optimization
- ☐ Company profile (share URL, criteria, objectives)
- ☐ Personal profile (include headshot & bio)

Search Engine Optimization (SEO)
- ☐ Keyword research & application
- ☐ Link back to URL from other sites
- ☐ Optimize for mobile & run speed tests

Optimize Axial Ranking
- ☐ 100% profile completion
- ☐ Respond to all outreach
- ☐ Be specific on all projects

Content Creation
- ☐ Commit to a consistent schedule
- ☐ Choose relevant format & distribution channels for your subject matter

OUTBOUND: Proactive Outreach

- ☐ Always make use of warm Introductions

Calls & Emails
- ☐ Create targeted lists (i.e. industry, region, "tier")
- ☐ Utilize announcements for closed deals, team updates, fundraising, etc.

INBOUND: Lead Conversion

- ☐ Publish Deal Criteria & Tombstones
- ☐ Implement a Funnel Tracking Process
- ☐ Include email addresses & phone numbers for the best individuals to connect with
- ☐ Respond to all inbound communication within 48 hours

IN-PERSON: Travel & Conferences

- ☐ Set a monthly, weekly, or quarterly goal for in-person meetings

Travel Optimization
- ☐ Create curated, regionally-specific outreach lists
- ☐ Post on LinkedIn when you'll be in a new city

Events & Speaking
- ☐ Request the attendee list
- ☐ Use conference floorplan for planning
- ☐ Track all meetings in CRM
- ☐ Engage & take notes in meetings
- ☐ Write personalized follow up notes

TECHNOLOGY: Software for Sourcing

- ☐ Implement CRM use across all teams
- ☐ Explore email marketing and mail merge softwares
- ☐ Integrate deal sourcing platforms like Axial into your daily routine
- ☐ Test AI tools for list creation