

The 4 Pillars of Marketing

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Pillar I: Retain and Grow Existing Relationships

Client Satisfaction

Describe the objectives you have regarding how you will ensure your clients are satisfied with the delivery of your services (conduct a client survey, schedule client interviews, send end-of-work surveys)

Examples include:

- Client satisfaction surveys and interviews
- End of case surveys
- Focus groups
- Client satisfaction training for staff and professionals
- Implement web-based survey tools

Client Service

Create an objective that defines your continued approach to serving your clients (new client intake, ongoing client service, rapport building with clients, keeping clients informed, communications via email, voicemail and returning telephone calls).

Examples include:

- New matter reports to track marketing
- Client intake and screening process
- Client service systems and process development
- Client service training for staff and professionals
- Client services best practices
- Development of Client Services Directory for use with employees, clients and the media

Cross Marketing

Define an objective you have related to providing more services to your existing clients, or better communicating how you can serve clients of the firm.

Examples include:

- Identify clients with top cross marketing potential (grid)
- Train associates on cross-marketing
- Incentive program for cross marketing
- Compensation plan consulting to reward results

Referral Source Development

Create objectives around developing your referral sources. How many new referral sources would you like to attract, in what industries?

Examples include:

- Incoming referral tracking
- Outgoing referral tracking
- Proactive and mutually beneficial referral source development
- Maximize referral-based associations
- Training on referral source development

Pillar II: Attract New Clients

Networking

What is your objective related to how often and with whom you will proactively develop relationships with?

Examples include:

- Identifying opportunities for the firm and individual professionals
- Networking programs for practice groups
- Networking training and best practices

Targeted Business Development

What is your objective in the area of developing relationships with new clients? How many do you want to attract? What industries do they represent? Do you have a sales pipeline?

Examples include:

- Client-specific marketing plans
- Practice group marketing plans
- Individual marketing plans
- Sales pipeline development and implementation

Proposal Development

What objective do you have in the area of increasing your ability to efficiently respond to requests for information about your services?

Examples include:

- Create proposal archive
- Develop efficient proposal response process
- Design professional and visually appealing proposal responses
- Write proposals for new business

Market Research

Define an objective related to incorporating market research into your practice before meeting with a new prospective client or referral source.

Examples include:

- Big opportunity research on companies and people
- Create client dossiers for new business

Trade and Professional Association Involvement

Every professional should be active in his/her industry association (Financial Planning Association or Bar Associations) as well as at least one industry-based association attracting prospective clients or referral sources. What is your objective in this area?

Examples include:

- Assess firm's involvement and ROI with associations
- Create association strategies to become high profile members by pitching professionals to write articles and speak at upcoming events

Pillar III: Increase Name Recognition and Awareness

Advertising

Are there opportunities for you to cost-effectively use advertising to convey the message of why clients should hire you? Advertising can be cost-prohibitive. Make sure there aren't better ways to increase your name recognition.

Examples include:

- Graphic design
- Copywriting
- Ad placement
- Campaign management
- Style guide development

Branding

Are you satisfied with the strength of your brand? Set an objective to enhance and improve the quality of your brand. Your brand includes your logo, tagline, marketing materials, website and other tangible aspects that reflect the personality and professionalism of you and your firm.

Examples include:

- New logo
- Letterhead, business cards, and identity materials
- New website
- Customized social media headers
- Branding Guide

Public Relations

Tap into the power of the press! Set at least one objective around activities you can pursue to garner positive press coverage for you and your firm. Do you want to draft an article for publication? Be interviewed on the radio? Become a spokesperson for the media?

Examples include:

- News release and media list development
- Story pitches
- Online media kit development
- Ghost-write bi-lined articles
- Position firm and professionals as “expert” sources for the media
- Secure speaking engagements with targeted groups

Trade Shows

You might have the opportunity to showcase your expertise at a trade show attracting prospective clients or referral sources. Create an objective for this area. Join an association, become a high profile member, and consider a presence at the organization’s annual trade show.

Examples include:

- Trade show booth
- Materials
- Soliciting presentations
- Networking guidance
- Follow up strategies

Community Involvement

Being an involved and active member of your community is an excellent way in which to build your reputation and increase your name recognition. Create an objective surrounding your current and future community involvement.

Examples include:

- Board and volunteer placements
- Promotion of activities on website and in communications

- How to maximize board involvement
- Leveraging pro bono activities

Social Media

LinkedIn, FaceBook, blogs – – what’s a person to do? One thing is for sure, social media is here to stay. Your marketing plan wouldn’t be complete without setting an objective in support of how you plan to engage in social media to build your name recognition and enhance your thought leadership to a very targeted group of prospective clients and referral sources.

Examples include:

- Individual LinkedIn profile creation and enhancements
- Develop company pages on FaceBook, LinkedIn, Twitter, YouTube
- Develop blogging program
- Create monthly posting calendar for the firm and attorneys
- Manage engagement on social media

Pillar IV: Create Targeted and Effective Communications

Client Communications

Set an objective around doing more communications with your target audiences. What do you want to communicate, to whom, and how often? Make your communications relevant to specific audiences versus too general.

Examples include:

- Develop e-based communications
- Firm announcements
- Ongoing firm-wide communications
- Invitations

Marketing Database

Can you easily and effectively communicate with your clients? If not you might want to create an objective around creating and managing your marketing information. Look into tools like Highrise, Constant Contact, and Campaigner.

Examples include:

- Implement marketing Contact Management System
- Implement communications database like Constant Contact
- Manage marketing database/CRM
- Run reports for marketing purposes
- Track and report on open rates of email campaigns

Website

How is your website? Over 85% of prospective clients will check you/your firm out online. Set an objective to create or update your website this year!

Examples include:

- Website strategic planning and site map development
- Copywriting with focus on key word research
- Website design and technical development
- Integration with social media
- Website promotion and communications
- Managing and updating client websites

Client Events

Interested in bonding with your clients, contacts and referral sources? Consider hosting an event and create an objective in this important area!

Examples include:

- All details including venue selection, catering, entertainment, speaker lineup, invites, promotion, and follow up
- Firm seminars
- Client events
- Employee events