

How to Create Your 2015 Marketing Plan: Phase II

– Setting Objectives and Implementing Your Plan

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Happy New Year! Picking up where last month's article left off, I would like you make a commitment to complete your marketing plan and actively implement your plan throughout 2015. As you recall, last month we conducted discovery and due diligence on your 2014 results. We also looked at the broader goals you have for your life financially, in your practice, with your family, travel you want to pursue, and overall, how you are going to enjoy the life you are working so hard to build. Now it's time to set objectives and implement a creative and cost-effective marketing plan for 2015.

The Plan: Where you Want to Be

Reflect on the information gathered in the assessment phase last month. Then, follow these steps to put your marketing plan in place. Next on the docket? Set measurable objectives. Every lawyer in private practice should build their marketing plan around activities that produce high impact results at a low cost. Your objectives should each be specific and measurable and should be built under what I have termed, The Four Pillars of Marketing. After you set objectives, you will then develop the marketing tactics designed to help you achieve each objective. Following are sample objectives with a number of suggestions on how to accomplish each. Marketing objectives serve as the roadmap to achieving your marketing goals for 2015.



Retain and Grow Relationships with Existing Clients and Contacts

Client Satisfaction Objective: Achieve a 95 percent client satisfaction rating with existing clients.

How: Conduct a client survey, schedule client interviews or send end-of-matter surveys.

Client Service Objective: Create replicable processes that define the XYZ law firm way of delivering services.

How: Define your process to serving clients including new client intake, ongoing client service, rapport building with clients, keeping clients informed, and communications via email, voicemail and returning telephone calls. Read “The E-Myth Attorney” by Michael E. Gerber for step-by-step instructions on how to run a successful and lucrative practice.

Cross Marketing Objective: Generate \$15,000 of new business by offering estate planning services to the firm’s divorce clients.

How: Introduce our estate planning lawyer to divorce clients at the end of the representation; develop a handout on “The Top Reasons you Need a New Will Post-Divorce.”

Referral Source Development Objective: Attract five new referral sources in 2015 that will each generate one client matter or case valued at \$5,000.

How: Assess past referral source traits. Identify where best referrals have come from, tap into contacts on LinkedIn to introduce you to more referral sources like your best. Meet these people. Ask great questions. Be the first to refer business to them.

New Business Development

Networking Objective: Attend at least one networking functions each week throughout 2015 with people who could become clients or refer business to you.

How: Analyze where your best clients have come from. Join an industry group that attracts prospective clients or referral sources. Become an active member. Write and speak for the organization. Remember networking is all about how you can help others succeed.

Targeted Business Development Objective: Identify three to five new clients or referral sources you would like to do business with in 2015.

How: Conduct research to identify people and companies that would be a great fit for your expertise. Search your LinkedIn contacts for connections. Ask your contacts to introduce you. Follow up and follow through. Conduct research on your targeted new clients or relationships.

Proposal Development Objective: Develop a proposal content archive by February 2015 that can be used to respond to new business development opportunities.

How: Develop a proposal response template that includes the sections: Our Understanding of your Needs, Our Approach to Meeting your Needs, About our Team and Fees Proposed. When responding to a proposal always start with the client and their needs

not the firm and its credentials.

Market Research Objective: Conduct market research on each new prospective client or referral source prior to first meeting.

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

Increase Name Recognition in the Marketplace

Trade and Professional Associations Objective: Research and join one trade association attracting prospective clients or referral sources.

How: Ask clients which organizations they value, join the association, attend meetings, become a high-profile member by writing, speaking and serving as a resource to members. A trade association is a long-term strategy. Make the commitment and stick with it.

Social Media Objective: Become a thought leader on social media by building your base of contacts on LinkedIn to over 500, and posting relevant content using social media a minimum of four times per month.

How: Spend 15 minutes per day focused on building your online reputation. Add contacts, comment on others’ content, answer questions, start discussions, congratulate contacts who received promotions and write one blog post per month.

Advertising Objective: Limit advertising budget in 2015 to less than \$1,000.

How: Focus efforts on social media and PR, only advertise in directories for organizations in which you are a member. Make sure you track how clients heard of you when they call in. Chances are they were referred to you versus seeing an ad you placed.

Public Relations Objective: Publish three articles in 2015 that will be read by prospective clients or referral sources; build a relationship with two reporters covering your practice area so they call you as a source.

How: Media outlets are always looking for fresh new perspectives. Create a list of ideal publications, radio or television shows on which you would like to be featured. Write an article outline, send it to an editor with a note on why readers, viewers or listeners would be interested and follow up!

Community Involvement Objective: Secure a board position for a nonprofit organization you support.

How: Research opportunities online, search LinkedIn for others involved in the organization, reach out to your best contacts with your message of wanting to serve on the board. Nonprofit boards love having bright, talented and dedicated lawyers on their boards.

Targeted Communications

Client Communications Objective: Distribute a timely and relevant communication to clients on a quarterly basis.

How: Develop topics that are timely and relevant to your clients and referral sources. Create content and





import your contact list into a communications tool like Constant Contact, Mail Chimp or Campaigner, send the communication and track reader analytics.

E-based Communications Tool Objective: Select and implement a communications tool that will allow me to cost-effectively produce quarterly communications by Feb. 15, 2015.

How: Research the most popular tools and subscribe to one. Research those referenced above.

Website Development Objective: Conduct a comprehensive review of your current website and enhance or redesign a new website by July 1, 2015.

How: Visit websites of other lawyers with whom you compete. Select the elements you like most and create a new sitemap for your website. Solicit bids from qualified companies. Make sure you choose a website developer willing to give you full access to your content for future updates, and who knows the critical importance of writing content with search engine optimization in mind.

Event Planning Objective: Host one client appreciation event in 2015.

How: Pick a date, determine a budget, develop a theme for the event, select the venue, send invitations, host event and follow up with attendees.

Finally, Implement your Plan!

This is the phase where the best laid plans fall short. Implementing your marketing plan is analogous to the commitment you likely made earlier in the month to go to the gym four days a week or to achieve the objectives you have set for yourself physically. Imple-

menting your marketing plan will be accomplished at two distinct levels:

Following up with your Contacts - Remember that 70-80 percent of next year's business will come from your existing clients and contacts. Based on the list of top contacts you created last month, commit to following up with each person in the first quarter of 2015. Track your efforts in a sales pipeline document so you always have next steps to follow up on. Determine what a logical "win" would be with each person. It might be an opportunity to market together, or an introduction your contact can make for you. Think also about how you can help your contacts including introductions you can make that will help them, or referrals you can make to them. It's a two-way street.

Pursuing Marketing Projects and Activities - As you review the marketing objectives above and the ideas on how to implement each objective, plan your marketing activities as you would a trial or a complex business transaction. Be organized and thoughtful as you consistently focus on reaching the objectives you have set for yourself. Create a tactical implementation plan that tracks the marketing activity, budget for the project, action items and next steps, and the date you would like to complete the project. Most important? Hold yourself accountable to achieving the objectives you have set forth in your plan.

By applying a strategic approach to assessing your practice and developing a marketing plan for 2015, you will be ready to approach 2015 with a roadmap that will lead to the continued growth and prosperity of your practice, and to your continued satisfaction as a lawyer.



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