

Develop Your Marketing Plan for 2017

An Eight-Step Process for Success



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Step 1: Identify your Best Contacts

Identify the top ten (10) contacts you have in each of the following categories. These individuals will represent 20% of your contacts with whom you will spend 80% of your marketing time:

Please use the attached spreadsheet to enter your contact names.


2017 Sales Pipeline

Current Clients: Name	Company	Type of Case	Referred By	% Probability of Landing	Revenue Potential 2017	Next Step
SUBTOTAL Current Clients					\$0.00	
Prospective Clients: Name	Company	Type of Case	Referred By	% Probability of Landing	Revenue Potential 2017	Next Step

Step 2: Contact and Referral Source Criteria

What do your very best clients have in common?

What do your "worst" clients have in common?

Define your A-level referral sources – what type of individual refers your best clients to you?:

Step 3: What Makes you Unique and the Value you Bring

What makes you unique as a professional?

What are your key “why you should hire me” messages?

Based upon what you’ve heard from satisfied clients, what do clients appreciate most about working with you?

-
-
-
-

What type of feedback do I receive from satisfied clients?

What do I want my clients to say about me when they refer me?

What expertise do I have that most lawyers don’t?

Step 4: Target Audiences

Take a moment to define your target audiences. Identify specific types of clients, referral sources, or industry groups most likely to value your knowledge. Once you know your target audiences, proactively plan to consistently get in front of these groups:

Describe an industry many of your clients belong to:

Based on past clients, what types of companies would you like to attract?

From what group of professionals or others do you receive a steady stream of referrals?

What type of people refer business to you?

What news reporters and blogs cover your industry?

Identify the key target audiences to whom you are marketing (client and referral source type – industry affiliation):

-
-
-
-
-

Step 5: Key Messages

Clients need specifics. They need to know that you have done what they need. This step involves creating key messages that reflect the results of Step 3. Take time to create representative experience for the work you would most like to replicate. Set a goal to have three or four pieces of representative experience on your biography for each of your key service areas:

Type of client:

Client's issue:

Your approach:

Result:

What messages uniquely differentiate you from other professionals with similar practices - - why should a client hire you (Refer to Step 3 Above)?

-
-
-
-
-
-

Step 6: Marketing Objectives

Creating objectives – specific and measurable goals you would like to achieve – can flummox even the brightest professional. Take the following format and use it for each objective you set under the broad categories of retaining and growing existing relationships, developing new business, increasing your name recognition, and communicating with your target audiences. As you create your objectives, think about:

- Specifically, what do you want to achieve?
- By when do you want to accomplish this?
- How will you measure the results?
- How much of your time will it take?
- How much money will it cost?

Identify Marketing Objectives for the following areas:

Pillar I: Retaining and growing relationships with current clients and contacts

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-matter surveys):

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

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.

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

Pillar II: Attracting new business

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

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

Trade and Professional Association Involvement – Every professional should be active in at least one association attracting prospective clients or referral sources. What is your objective in this area?

Pillar III: Increasing your name recognition in the marketplace

Advertising – Are there opportunities for you to cost-effectively use advertising to convey the message of why your clients should hire you? Identify your advertising objective here.

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 you and your firm.

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 write an article for publication? Be interviewed on the radio? Become a spokesperson for the media?

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.

Social Media – LinkedIn, Facebook, blogs - - what's a professional 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.

Pillar IV: Pursuing targeted and effective communications

Client Communications – Set an objective around doing more targeted communications with your target audiences. What do you want to communicate, to whom, and how often?

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.

Website – How is your website? Take some time to review your website, as well as other law firm websites. What objectives do you have around enhancing your website?

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

Step 7: Define your Revenue Goal

TOTAL Revenue Generation Goal for 2017: \$_____

Client Name	2015 Revenue (\$)	2016 Revenue (\$)	2017 Revenue Projected (\$)	Comments
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
2017 Total Revenue Goal				
<Minus>				
2017 Projected Revenue			\$	
Equals				
Total Revenue Needed to Achieve Goal				

Step 8: Action Plan

This is where the proverbial rubber meets the road. Follow this format for every objective you set in Step 6:

- How committed are you to achieving this objective (extremely, very, somewhat, not)?
- What action will you take to meet this objective?
- What else can you do to take action on your objective?
- Who can support you in meeting your objective?

Your marketing action plan will be organized around the Four Pillars of Marketing (sm)

Pillar I: Your Plan to Retain and Grow Relationships

Identify five activities you will do in support of the objectives you created:

1. _____
2. _____
3. _____
4. _____
5. _____

Pillar II: Your New Business Development Plan

Identify five activities you will do in support of the objectives you created:

1. _____
2. _____
3. _____
4. _____
5. _____

Pillar III: Your Plan to Increase Name Recognition

Identify five activities you will do in support of the objectives you created above.

1. _____
2. _____
3. _____
4. _____
5. _____

Pillar IV: Your Targeted Communications Action Plan

Identify five activities you will do in support of the objectives you created above:

1. _____
2. _____
3. _____
4. _____
5. _____

Questions? Feel free to contact:



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