



MARKETING ASSESSMENT

INTRODUCTION

Many lawyers and firms are engaged in ineffective marketing activities out of habit - just because they've "always done them that way." Getting a clear picture of your current investments of time and money in marketing is a necessary first step before developing a new marketing strategy.

TRACK YOUR TIME AND EXPENSES

The Marketing Assessment Spreadsheet (included with this download) breaks your marketing time and money into the following categories. You can read more about each below.

- Client Retention
- Events, Conferences & Networking
- Groups & Associations
- Advertising (Print and Online)
- Expenses Related to Website & Digital Assets
- Content Development & Distribution
- Print & Promotional Items
- Firm & Administrative Items

MARKETING CATEGORIES

Client Retention

List any expenses related to client retention. These may include lunches, dinners, holiday gifts, outings, and travel-related expenses to visit a client.

Events, Conferences & Networking

Inventory all the events, conferences, and continuing-education programs you attend on an annual basis.

1. **List each event or conference.**
2. For each event, **write down your estimated annual time commitment.** Consider travel time, preparation, and follow-up.
3. For each event, **write down your estimated annual financial commitment.** Consider travel and lodging for conferences, event-registration fees, and sponsorships. Include your dues in the "Groups and Associations" category below.
4. **Write down your objective(s) for attending each event.** This might be continuing education, networking with other attorneys, face time with current clients, or making new contacts.



5. **Be sure to include the CLEs you attend.** This is one area that you may be able to cut back by finding less time-consuming and/or less expensive options. There are opportunities to combine CLE time with networking as well.
6. **Include general networking as well.** Lunches and coffees with referral sources and prospective clients. (Don't include current clients; that can be included in the "Client Retention" section.)

Groups & Associations

Record your involvement with groups in the following categories:

- **Professional:** Attorney groups such as state and local bar associations.
- **Civic:** General community groups including your Chamber of Commerce, Rotary, etc.
- **Industry:** Business-focused groups that offer professional development and networking for a particular industry. (Ex. Society for Human Resource Management, SHRM)
- **Philanthropic:** Nonprofit groups for which you volunteer. This could be on a board of directors, on a committee, or fundraising.
- **Interest-Based:** Groups that revolve around a hobby or interest.

You may want to record this group category in the "Details" section of the spreadsheet. Lawyers spend a lot of time with other lawyers. It may be quickly apparent that you need to diversify your involvement.

1. **List each group that you are involved in.** (Involvement = spending your time or money. You can also list sponsorships here.)
2. For each group, **write down your estimated annual time commitment.** Consider meetings, conferences, volunteer work, fundraising, travel time, etc. for the year.
3. For each group, **write down your estimated annual financial commitment.** Consider membership dues, expected financial contributions, or sponsorships.
4. Write down your **objective for involvement in the group**, including leadership roles or committee involvement. Also note when your membership will end.

Advertising: Traditional and Online

List all traditional and online advertising you've done or are under contract to do in the past twelve months. You will find a comprehensive list of advertising types on the spreadsheet.

Expenses Related to Website & Digital Assets

List all website-related expenses. This may include domain-name registration, monthly hosting, additional monthly support to hosting or web-development companies.



This may also include premium social-media subscriptions (like LinkedIn Premium) or costs associated with Avvo (like Pro membership or display ads.) Directories like Martindale, Super Lawyers, and similar expenses will go here too.

Consider also software-as-a-service (“SaaS”) subscriptions for email marketing (Constant Contact, MailChimp), contact management (such as Salesforce), and other technology.

Content Development & Distribution

If you are outsourcing content development, whether for copywriters, graphic designers, video production, include it here. You will also want to include the time you spend creating content. This may include developing presentations, curating content, writing blog posts, or articles for newsletters.

Print & Promotional Items

This will include any direct mail, brochures, business cards, or other printed materials you use in your marketing efforts. List promotional items (logoed merchandise) here as well.

Firm & Administrative Items

Use this section to record the time you are investing in non-billable activities other than business development, client retention, and content development. These can be large commitments (especially for the solo or small-firm attorney) that you may be able to improve or reduce.

Action Item:

Use the Marketing Activity Spreadsheet to record your investment of time and money into marketing and relationship building activities. Below we’ve included profiles for two fictitious attorneys, Associate Amy and Small Firm Steve. The spreadsheet file includes examples of how they would fill out the spreadsheet, just to provide you with some guidance.

Additional Resource

There is an additional tab on the spreadsheet – a sample annual marketing budget for you to use.



ASSOCIATE AMY

Amy's Practice

Amy has been with a large, statewide litigation firm for her entire 5 years of practice. She will be up for partner in two years, so she realizes she needs to get serious about building her book of business. Her practice focuses on various types of civil litigation, and she is a sought-after "second chair" by many of the partners in her firm.

She serves on the firm's diversity committee and helps with on-campus interviews and other aspects of the firm's summer-associate program.

She has recently started writing one blog post per month for the firm's blog, and she assists a partner with a comprehensive case-law summary each year.

Local Organization

Occasionally, Amy will attend events hosted by a local organization, ShopDrop, that serves area restaurants and retailers. She must be a supporting member to attend, and the dues are \$250/year. Registration fee for meetings is \$25/meeting and she attends an average of four each year. Each meeting is from 5:30-7 p.m. She usually leaves the office at 5:30, arrives at the meeting by 6 p.m., and leaves by 7 to get home by 7:30. (Total time commitment of two hours per event.)

National Conference

Amy goes to Chicago each year for a three-day seminar hosted by ECPI, a national organization that serves civil defense attorneys.

Client Visit

For the past three years, Amy has traveled with a group of attorneys from the firm to visit one of its top clients, AmCo, Inc., on an overnight trip. Before the trip, she has to update the firm's continuing-education presentation that they give to the client during their visit. The trip itself is about 32 hours of her time, and she spends about four hours updating the presentation.

Social Media

Amy is active on LinkedIn, and pays \$70 per year for a premium membership. She spends around 15 minutes each day on the site and curating articles to share on her profile.



SMALL FIRM STEVE

Steve's Practice

Steve has been practicing law for more than 25 years. After law school, he joined a boutique firm in his hometown. Ten years ago he broke off with two other partners to start their own boutique corporate firm. 75% of the firm's work comes from 2 local clients, ABC, Inc. and XYZ, Inc, and Steve wants to diversify his practice to with more small business owners.

Client Retention

Steve and his partners host key executives and spouses from each of these clients for holiday dinners each year. Steve checks in with each client 3 times a year over lunch.

Philanthropic Involvement

Steve is in the 2nd year of a 3-year term on the board of directors of a local nonprofit organization. He serves as Chair of their Fundraising Committee. This leadership role requires Steve to attend a monthly board meeting that lasts approximately 2 hours.

Additionally, he spends about 2 hours/month on board related activities, and 20 hours in the months of October and November on fundraising activities during their annual campaign. Because of his leadership position, he is expected to give \$1500 annually.

One of the firm's clients asks Steve and his partners for contributions to their corporate charity each year. Steve gives \$1000 annually.

Professional Involvement

Steve is a council member for his state bar association's business law section. The group meets 4 times a year, and the meetings, with travel time, cost Steve about 3 hours each, or 12 hours annually. Each year he helps plan the group's continuing education program which is an additional 15 hours of his time each year. Steve also attends the two day CLE at the coast each year.

Website

Steve's firm is currently under contract with SearchLaw, the company that built their current website more than 2 years ago. Their monthly fee with SearchLaw is \$700/month and will end in October.



Social Media

Steve has a LinkedIn profile and asked his son to set up a Facebook page and Twitter handle for the firm. He recently joined Avvo Pro and signed up for their display ads service. These features cost him \$50 and \$100/month, respectively.

Print Ads & Merchandise

The firm has a long running ad with the Yellow Pages which costs \$425/month. The contract with Yellow Pages through June 2017.

The firm also spends about \$1200/year on logoed merchandise including pens, notepads, and coffee mugs.