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Five steps bring new life to marketing plans

Every lawyer should have a new year's resolution to review and revamp their marketing plan. Doing so not only benefits the lawyer, but also the clients who are being served by that lawyer. Having no marketing plan or an outdated plan is a sure way to achieve little or nothing in the coming year.

Viewing your practice as a business that needs constant reinvigoration and concrete goals ensures that you keep up to date with your clients, your practice and your firm.

Updating and reworking a marketing plan should not be difficult. I find that it is easiest to approach this task in five easy steps.

Step 1: Review and revamp your client and target list. Your contacts and client and target list should be updated throughout the year as you acquire new clients and network. However, I find it helpful to go through my list with a very critical eye at least once a year. For my entire contact list, I make sure that the information I have is up-to-date and that any new and helpful contacts I have made recently have been added to the list. I often use LinkedIn and other social media tools to make sure that my list is accurate. My secretary assists me with these searches. After my list is updated with current information, I assess whether or not my list is complete and whether or not the targets listed are even viable clients for any practice at my firm.

Step 2: Connect with your clients and targets. Once I have updated my list of contacts, clients and targets, I put together a specific schedule to connect with my clients and targets, apart from the actual work I do for them on a daily basis. I take the first few minutes of my workday to make at least one connection and I try to connect in a personal way at least once a month with each client and target.

Connecting can mean taking an individual to lunch or dinner or to an event or simply sending them a client update. Through these connections, I try to gather information regarding the issues and problems that they are currently facing. To do this, I have to make sure that I can sit down and talk to them on a regular basis — preferably in person. Finding out what they enjoy personally can help with this. For example, if I find out that a client enjoys baseball or the spa, I know that if I take them to a game or to a spa (or both), I will have some time to communicate and connect with them.

Step 3: Provide value to your clients and targets. After educating myself on my clients' and targets' most recent concerns, I find a way to bring them value and solutions. This can mean learning more about an particular issue in my practice area, putting together a team of attorneys to assist them or recommending other services which can help. Sometimes I go into my clients' place of business and provide training and assistance and sometimes I seek out the assistance of other attorneys



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at my firm. My goal is to enable my clients to achieve their own goals. Helping clients and targets to succeed engenders their loyalty and, in turn, increases your own success.

Step 4: Improve your own credentials to make yourself and your team an easy sell to clients. At the same time as I am providing value to my own contacts, I also am working on improving my own credentials so that clients and targets will continue to seek out my services with any issues they face. Becoming involved in industry associations is a powerful tool. Independent research and information from my clients and colleagues help me to identify the industry associations that are most relevant to my practice. I

then become not just a member, but an involved member. I attend industry conferences and I use those conferences as a vehicle to speak or write articles on subjects of interest to my clients. Third-party credentialing also can be a powerful tool. I take the time to make sure that I am recognized locally and nationally for the work that I do. I research and seek out third-party credentials; I do not wait for them to come to me. I find that clients and colleagues are more than happy to recommend my services and to help me receive credentials and awards.

In the process of recommending me, my clients find out even more about my practice and how I can better serve them.

Step 5: Ask those clients and targets for referrals to other clients and targets. One powerful marketing source, which many attorneys overlook, is the referral network of an attorneys' own clients. Corporate counsel know other corporate counsel in their particular practice area and they can refer your work and firm to their colleagues. I have gotten many new cases through client referrals.

After executing these five steps, I choose a deadline for each action which makes up each step. By holding myself accountable in this way, I ensure that my new marketing plan is executed, bit by bit and day by day. My reward for this work is a better relationship, both personally and professionally, with my clients and the other attorneys at my firm and a more successful practice.