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## Part 1

# How to get started

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Part 1 of this book is for lawyers who are ready to commit to a regular marketing program. It describes a three-step process to outline a one-page marketing plan, and to follow up.

It assumes that you are already convinced that marketing is important. If you're not, you may prefer to begin with Part 2.



*“A journey of a thousand miles  
begins with a single step.”  
– Lao-Tsu<sup>1</sup>*

## Chapter 1

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### Three steps to new business

I know you don't have time for marketing. You can barely find time to go home on Saturday.

But you know that marketing is more important to lawyers than ever before.<sup>2</sup> Whether you are focused on financial security, personal satisfaction, or becoming a great lawyer, the key to success lies in improving your service and relationships, and that equals marketing. So you know in your heart that you **MUST** find a way to fit some marketing time into your overcrowded schedule.

I have good news and bad news.

The good news is that lawyers can achieve significant marketing progress in as little as an hour a week, as long as they limit their efforts to current clients and referral sources. This won't produce new customers, but it probably will produce new revenue. And even if it doesn't, it will protect your most important asset: the clients you already have.

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<sup>1</sup> Lao Tsu, *Tao te ching*, Verse 64. (Published in the sixth century BC; only the Bible has been translated more often.)

<sup>2</sup> If you're not convinced that marketing is critical, turn to Chapter 2. This chapter is aimed at lawyers who are ready to begin marketing, and want to get started as quickly as they can.

The bad news is that finding new clients is the hardest work you can do in a suit. If that's your marketing goal, you will need to make a serious time commitment. But even here, there's some good news. You can substantially increase your chances of success by focusing on the tactics that best fit your practice and your personality. This book will explain how. And even if you've never thought of yourself as a marketer, you could find that you have the talent and interest to become a top rainmaker.

Whatever your goal, the keys to marketing success are prioritization and follow-up. You must prioritize tactics based on how quickly they will work for you, and then follow up with efficient action items. This book provides tools which will help you become disciplined about prioritizing and relentless about following up.

Can every lawyer really learn to succeed at marketing? Absolutely. Only a few will develop into the great rainmakers who bring in new clients, year after year. But any lawyer who has clients can learn, and must learn, to build stronger relationships.

Do you need to do this yourself? Yes. Many lawyers have tried to hire people to market for them, so that they can spend all their time on the law. This will not work in the current environment. Mind you, I am a professional marketer, so of course I believe that people like me are an important part of any business development team. But I also know that marketing professionals can't do it alone.

The only way to grow legal business is to grow personal relationships. *Your* personal relationships. If you need to lose weight and exercise, you can't hire somebody else to do your pushups. And if you need more marketing, you can't hire somebody else to build your relationships.

Do you want to devote time to developing new business? Frankly, it doesn't matter. Sure, it would be wonderful if you loved marketing. The more you enjoy it, the more likely you are to follow up and succeed. But if you want to work as a lawyer, you must have clients. Meanwhile, your competitors are getting better at marketing, and

some may soon try to take your clients. The only way to defend yourself is to become a better marketer, whether you like it or not. Once you start having some success, I think you will like it. Until then, just put it in the same category as flossing, and get over it.

Since lawyers are so busy, I've designed an approach to get off to a quick start, and achieve maximum results within realistic time limits.<sup>3</sup> You can complete this first chapter in less than an hour. When you do, you will have a one-page personal marketing plan like the next page. It will be custom-developed, by you, to fit your practice and your personality. You will also have a measurement process in place to help you follow up, and assure that your good ideas are turned into action. After that, it's up to you.

So when you've finished this first chapter, put down the book and start marketing. The other chapters can wait.

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<sup>3</sup> I've spent the last twenty years training people in every imaginable profession, and I have never seen a group that works longer hours than lawyers.

ONE-PAGE MARKETING PLAN	
Goal	
<i>Who?</i>	<i>What?</i>
Hours per week committed to marketing	
How will progress be measured?	

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## ***Step 1: Prioritize***

Your marketing plan must start from a general goal. If you don't know where you're going, you'll never get there.

If your practice group has a marketing plan in place, it may already specify a goal such as "Increase revenue from existing clients by ten percent in the next year," or "Begin engagements with two new venture capital firms in the next six months." In that case, just write the practice group goal below.

### **ONE-PAGE MARKETING PLAN**

Goal

If your practice group does not have a formal marketing plan, it should consider one, as explained in Chapter 5. But you don't have time to wait. While the marketing people are working on a draft, you should select one or more of these goals:

- Build stronger relationships with my best clients and referral sources (produces fastest results).
- Get engagements with new clients.
- Increase visibility with potential clients and referral sources (produces slowest results.)

The single most important concept in this book is that marketing must focus first on your current clients.<sup>4</sup>

It is marketing malpractice to ignore the short-term goal "Build stronger relationships with my best clients and

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<sup>4</sup> Again, Chapter 1 assumes you want to get right to work, before reviewing all the data behind these concepts. If you'd prefer to first see the facts and figures behind this claim, turn to Chapter 3.

referral sources.” These are the people who pay for your office, your car, and your kids’ shoes.

If your clients are taken away by a hungrier, more aggressive competitor, things could get ugly fast.

I know that the quality of your legal work is exceptional, and that your sources love you. But sometimes that’s not enough. There may be other lawyers out there who are almost as competent as you, who will offer your client something better or at least something new. If a trophy lawyer comes along, it will be hard to recover.

As Steve Barrett, Chief Marketing Officer at Drinker Biddle, put it “Once you lose the trusted advisor role, you are on the outside, and it could take five years to get back in.”<sup>5</sup>

And once a valuable referral source starts sending work to others, you are in just as much trouble. This risk exists even if the referrals come from within your own firm. In an age of lateral moves, mergers and acquisitions, and occasional law firm meltdowns, things can change overnight. You need to protect those relationships with every tool in your belt.

In addition to the top goal of working with current clients, it would be great if you could find time for one or both of the other goals, which involve building new relationships with people who don’t know you. Every law firm needs a steady stream of new clients. If you are the person who finds them, your security, prestige and compensation will go up. Professional visibility is also important, especially for associates and lawyers who are building a new practice area. (Note, however, that the visibility goal produces results much more slowly than the other choices.)

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<sup>5</sup> Quoted in Hassett, Jim. “Sales training: What works with lawyers.” *Law Firm Inc*, in preparation.

Once you've selected your goal, you are ready to fill in the next section of the plan: action items defining your target audience and specific tasks.

<i>Who?</i>	<i>What?</i>

Your one-page marketing plan has room for just five clients and actions. That's because most lawyers have so little time. Marketing works best when your prioritization is disciplined and relentless. If you insist on working with more than five, make another copy and call it your two-page marketing plan.

If you already know who to focus on, and what you should do, just write it in the appropriate section and proceed to Step 2. For everyone else, start by filling in the "Who?" column.

List your largest and/or the most profitable clients and referral sources. If you're not certain who those are, follow the advice of Gerry Riskin, one of the most widely quoted consultants in legal marketing: "Imagine your worst nightmare: Your assistant walks in and says that a client has asked to have all their files sent to a new firm. Who do you pray it isn't?"<sup>6</sup>

If you want to focus on new clients, be as specific as possible about who you want to reach. If you know the names of people or organizations, list them here. If not, come up with the most precise possible description, such as General Counsel for Fortune 1000 biotech firms, or union leaders for organizations of five hundred employees or more, or owners of privately held companies with at least twenty million dollars in annual revenues.

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<sup>6</sup> Hassett, Jim. "Bulletproofing your crown jewel clients – Part 2." Blog dated February 22, 2006. [www.jimhassett.com](http://www.jimhassett.com).

Once you've identified the who, you are ready to begin thinking about what you will do. To get you started, this chapter includes checklists for current clients, referral sources, potential new clients, and visibility. Jump ahead to the checklist that fits your target, pick the items that best fit your practice, and fill in your "who" and "what."