

CHECKLIST: CREATE A MARKETING PLAN FOR YOUR SMALL LAW FIRM

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Create a Marketing Plan for Your Small Law Firm

By [Elizabeth C. Jolliffe](#)

Step-by-Step Guidance

Step 1: Identify your practice niche.

- What legal services do you provide?
- What skills or experience are you known for or do you want to be known for?
- Describe your practice in one or two sentences.
- See additional [practice guidance](#) on practice niches.

Step 2: Identify your niche target market.

- Who do you want to reach? Who needs your services? What kinds of people or situations do you like to service? Who do you want calling you?
- If *individuals* will be your target clients, what age range, what occupation, income range, family type, etc., would you expect in your clients? If *businesses* will be your target clients, what industries, how large, average revenues, type of ownership, etc., would you expect?
- Where do you already have opportunities, connections, a knowledge base, a reputation?
- Look at the needs of your geographic region, including the size of your legal market, any trends, or limitations.
- Identify the following:
 - ideal clients by name or type
 - ideal clients by name or position
 - ideal referral sources by name, position, or service
- See the [Choosing a Niche Target Market Worksheet](#).

Step 3: Identify your competition.

- Your market analysis should include an identification of the competition, as well as why your service will be better than or different from the competition.
- Who are your competitors? How strong are they? Are your target clients already using your competitors? Are your competitors strong enough financially to force you out?
- See the [Assessing Your Law Firm's Competition Worksheet](#).

Step 4: Identify your current business development stage.

- What stage are you in regarding business development? A new lawyer without any clients or contacts? Or an experienced lawyer with no or few clients but with lots of contacts?
- Where do you need to focus your business development efforts?
 - Building your knowledge of and reputation for your niche services?
 - Establishing contacts in and referral sources to your target market?
 - Deepening relationships with your connections with your target market?
 - Following up on connections and turning them into business-producing relationships, including referrals?

Step 5: Identify your business development goals for the next three, six, and twelve months.

- To be effective, your goals should be SMART—Specific, Measurable, Actionable, Realistic, and Time-driven. Set your goals for the next three, six, and twelve months based on your answers in the preceding steps. Put these goals on your work calendar. Choose a color and use it for all calendar entries for your business development goals and activities.
- What do you want to accomplish by the end of twelve months? Think in terms of revenue, number of new clients, referral sources, contacts in your niche market, knowledge in your practice area, etc.
- What do you need to accomplish in the next six months to meet your twelve-month goals?
- What do you need to accomplish in the next three months to meet your longer-term goals?
- What do you need to do on a weekly basis to meet your longer-term goals? (Refer to your responses in Step 6 below.) Put these activities on your calendar as a daily or weekly appointment with yourself so that you do them.
- See the [Law Practice Business Development Goal-Setting Checklist](#).

Step 6: Select your marketing tactics to reach your target market.

- Choose a *few* simple, repeatable marketing tactics that fit you, and use them consistently to reach your target market. These are your *keys* to success. Common tactics to select from include the following:
 - One-on-one networking and relationship building
 - Traditional memberships in associations and groups related to your target market
 - Referral sources
 - Online technology and online networking like websites, blogs, e-mail, e-newsletters, Twitter, LinkedIn, and Facebook
 - Writing for and/or public speaking to your target market
 - Advertising, publicity, and sponsorships
 - No-tech/no-cost placement or distribution of marketing material (i.e., community bulletin boards)
- **Be Strategic.** Because it generally takes between six and seven contacts before a prospect takes action—and you probably have limits on resources such as time, money, and energy—make sure you first focus those resources on developing and enhancing relationships in your target market, including with potential referral sources.

Step 7: Prepare your marketing tools.

- **Business cards.** They should be professional and on high-quality paper. Include a brief description of what you do and for whom.
- **Advertisements.** Consider whether advertisements are the best way to reach your target market. Be warned: advertising can come with a hefty price tag. If you decide on advertising, identify the best publications to reach your target market.
- **Website.** Be strategic about creating your website. Identify the purpose you want it to serve for your practice and create it according to your needs and your budget (e.g., do you want your website to drive your online business or to serve as a validation site and online presence?). Your website should be branded to match your business cards (or

vice versa) and should include *at a minimum* your credentials, legal services provided, practice areas, contact information, and a professional photo. Consider building it on a blog platform or including a blog on your website as an additional marketing tool. Blog about matters that interest you and that will attract the kind of clients or work you like. Put a link to your LinkedIn profile on your “About” page and on your “Contact” page.

- **Facebook.** Consider creating a professional profile. At a minimum, include a description of your practice in the “About” section of your personal Facebook page.
- **LinkedIn profile.** Create or expand your profile. Search engine optimize your profile, headline, and title with keywords about your services and niche target market. Put your website address on your profile.
- **Elevator speech.** You should have a 10–20 second elevator speech or self-introduction that incorporates energy around the benefits of what you do and for whom. Your speech should be a concise, memorable description that you can use when people ask, “What do you do?” It is important to have something prepared that makes a good first impression. See the [Crafting an Elevator Speech Worksheet](#).
- **Electronic announcements.** Weigh the cost of printing and mailing announcements versus electronic announcements via e-mail.

See additional [practice guidance](#) on other tips on marketing.

Step 8: Make a list of your market contacts.

- Look at all of your existing contacts and identify by name which ones are in your target market or are potential referral sources for work in your target market.
 - clients and former clients
 - friends and relatives
 - neighbors
 - business associates
 - church members
 - former colleagues
 - classmates
 - trade associations and industry groups
 - noncompeting attorneys
 - other service providers to the same market
 - alumni associations
 - nonprofit organizations and boards
 - community activity partners
 - school boards
- See the [Law Practice Target Market Contacts Worksheet](#).

Step 9: Make a list of potential contacts in your target market.

- Referring back to your [Choosing a Niche Target Market Worksheet](#), do research to learn more about this market and identify:
 - Ideal clients by name or type
 - Ideal client contacts by name or position
 - Ideal referral sources by name, position, or service

See the [Law Practice Target Market Contacts Worksheet](#).

Step 10: Plan to reach out to your identified contacts.

- Use the two or three marketing tactics you chose above to start getting in front of and meeting potential contacts in your target market. Volunteer and become a frequent speaker or writer for your potential market. Or consistently attend and participate in other events those people attend. Join and actively participate in in-person and online groups such as LinkedIn involving potential contacts in your market. Or consider where your potential contacts (by name or type) congregate or hang out (bars, coffee shops, specific restaurants, conferences) and go there. Consider what they read or do and get in front of them that way. Enlist other people's help in meeting these potential contacts.
- Commit to daily or weekly business development activities to reach out or stay in touch with your target market contacts or potential contacts identified in Steps 8 and 9. See additional [practice guidance](#) on daily business development activities.
- When establishing and maintaining business relationships, use your best relationship skills—the same skills you use or should use in your marriage and/or other personal relationships. Listen, ask, observe, care, pay attention to details, be thoughtful, helpful, giving, attentive, curious, patient, creative, spontaneous, and acknowledging. Set your sights on establishing a relationship, not just landing a piece of work.

Step 11: Set your marketing budget.

- Be realistic about what you can spend on marketing. Be smart about focusing your budget on effective techniques to accomplish your three- to twelve-month goals using your chosen marketing tactics.
- Your budget should include the cost of business cards; professional headshot and three-quarter shot photos; logo; website hosting and web designer, if appropriate; memberships in trade associations, bar associations, or other groups, if appropriate; networking meals with clients and contacts; attendance at networking events with your target market; etc.
- Because one-on-one connections are typically the most productive way to develop business, spend your financial and other resources on ways to create more of those relationships rather than on expensive sponsorships and general advertising. Depending on the nature of your practice, your website may serve as your brochure. Or you can create an electronic brochure using software programs such as Publisher rather than paying the cost to create, print, and mail a glossy trifold or other brochure.
- See the [Law Practice Marketing Budget Worksheet](#).

Step 12: Compile your marketing plan.

- Your completed plan should outline:
 - Legal services offered
 - Niche target market (ideal client to be serviced and/or ideal referral source)
 - Three-, six-, and twelve-month business development goals
 - Chosen marketing tactics (the few specific ways you propose to consistently reach your target market)
 - Weekly business development activities
 - Marketing budget
- See the [Sample Law Practice Marketing Plan \(Template\)](#) and the [Sample Law Practice Marketing Plan \(Completed\)](#).

When to Use

This How-To Kit explains how to draft a marketing plan for a solo or small law firm. It is geared toward a lawyer or lawyers starting a new practice, but it is useful for lawyers with firms who may not have previously gone through the exercise of drafting a marketing plan. The kit includes worksheets to help you focus your marketing efforts, and a sample blank and sample completed marketing plan.

Using these materials is not a substitute for the attorney's independent judgment, drafting, and research.

Other Resources

Books

- ICLE's [Michigan Basic Practice Handbook](#) (see chapter 1)
- *Get Clients Now!* by C. J. Hayden
- *Get Slightly Famous*, by Steven Van Yoder
- *How to Work a Room*, by Susan RoAne
- *Little Red Book of Selling*, by Jeffrey Gitomer
- *Rainmaking Made Simple*, by Mark Maraia
- *Women Rainmakers' Best Marketing Tips*, by Theda Snyder
- *Networking for People Who Hate Networking: A Field Guide for Introverts, the Overwhelmed and the Underconnected*, by Devora Zack

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