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The Ethics of Marketing your Law Practice: The Rules Related to Marketing in Illinois

THE CHICAGO BAR ASSOCIATION

by

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Table of Contents

Part I – Ethical Marketing in Illinois

The Four Pillars of Marketing (sm)

This presentation will discuss ethical marketing strategies for lawyers in Illinois in four key areas we refer to as "The Four Pillars of Marketing ^{sm}". Under each of the following Pillars, you can see the specific rules we will be discussing:

I. **Retain and Grow Relationships with your Existing Clients and Contacts**
   a. **Rule 1.1** Competence
   b. **Rule 1.2** Scope of Representation
   c. **Rule 1.3** Diligence
   d. **Rule 2.1** Advisor

II. **Attract New Clients and Develop New Business**
   a. **Rule 1.16** Declining or Terminating Representation
   b. **Rule 7.3** Direct Contact with Prospective Clients

III. **Increase Name Recognition and Awareness**
   a. **Preamble to the Rules, Paragraph 6B** Public Interest Legal Service
   b. **Rule 3.6** Trial Publicity
   c. **Rule 6.3** Membership in Legal Services Organizations

IV. **Create Targeted and Effective Communications**
   a. **Rule 1.4** Communication
   b. **Rule 7.1** Communications Concerning a Lawyer's Services
   c. **Rule 7.2** Advertising

Pillar I. Retaining and Growing Relationships with Existing Clients

Following is a summary of the Rules related to competence, scope of representation, diligence, communication and serving as an advocate to clients.

Rule 1.1 Competence

> *A lawyer shall provide competent representation to a client. Competent representation requires the legal knowledge, skill, thoroughness, and preparation necessary for the representation. . . .*

Before you begin thinking about marketing, focus on developing your competence as a lawyer. Many lawyers think they need to start marketing right out of law school. Instead, spend your first few years as a lawyer transitioning from the theory of law school into the reality of serving "real" clients in the private practice of law. Remember, competence drives a client's perception of you as the "lawyer of choice" in a particular area of law. Select two or three areas to focus on as you cannot be truly competent in all areas of law. These should be areas of law you want to become known for in the community. Build competence in select areas and then ethically communicate your skill to prospective clients and referral sources in order to drive your new business development efforts.

Tips:

- Attend CLE presentations in your primary areas of practice to continue building your level of competence.
- Select a mentor in your firm or community with a similar practice and learn from that person by calling him or her when presented with a complex set of legal facts.
- Learn to be selective about the clients you attract. Only open files for clients you know you can competently represent.
- Take a moment to note what your best clients have in common (traits, characteristics, type of individual or company, from whom they were referred). Focus on attracting the highest caliber of clients with legal work that utilizes your highest levels of competence.
- Build strong relationships with others in the legal community who are competent in areas of law other than those you have chosen, and develop mutually beneficial referral relationships.
- Identify a substantive area of law in which you have a high level of competence. Develop an outline for a presentation you could present on the topic. Identify the ideal audience for your presentation and contact the appropriate organization concerning your idea.

Rule 1.2 Scope of Representation

A lawyer shall abide by a client's decisions concerning the objectives of representation . . . and shall consult with the client as to the means by which they are to be pursued . . . .

Building a strong working relationship with clients requires an understanding of the client's goals and a willingness to partner with the client in achieving those goals. Communicate and confer with your client during all aspects of the representation. Discuss your overall case or deal strategy thoroughly so that both you and your client share the same expectations for the outcome.

Tips:

- At the beginning of your representation discuss your client's expectations. Are they willing to settle or negotiate? For how much?
- Schedule regular updates with clients and get in touch—even if there is nothing new to report
- Discuss your client's options with him/her thoroughly and provide advice, but always defer to your client's wishes regarding settlement in a civil case and to the plea, jury trial preference, and desire to testify in a criminal case.

Rule 1.3 Diligence

A lawyer shall act with reasonable diligence and promptness in representing a client.

Diligence is defined as "conscientiousness in paying proper attention to a task; giving the degree of care required in a given situation." The marketing side of diligence is client service - staying on top of every element of your client's case or transaction; and ensuring you and your support staff have a process in place to usher your client's matter through the legal process. Note that "diligence" and "promptness" fit hand in glove. Many high achieving professionals admittedly succumb to procrastination. Do not "do it" tomorrow. Develop processes for your representation of clients which enable others in your law office to help you move important client matters forward. You never want to miss a deadline or worse yet, let a statute of limitations run.

Tips:

- Develop a process for each type of case or matter you work on.
- Ensure all relevant deadlines are noted in your (and your support staff's) tickler system.
- Delegate case management responsibilities to those who support you to ensure you have a backup system in place to prevent missed deadlines.
- Regularly meet with members of your legal team to discuss upcoming deadlines.
- Establish a peer review process in your firm; a check and balance system to proactively manage pending matters.

Rule 2.1 Advisor

In representing a client, a lawyer shall exercise independent professional judgment and render candid advice. In rendering advice, a lawyer may refer not only to law but to other considerations, such as moral, economic, social and political facts, that may be relevant to the client's situation.

Serving as an advisor means first and foremost having competence in the area(s) of law in which you serve clients. But beyond that, an advisor also keeps his or her finger on the pulse of various business, industry, economic, social and political trends affecting clients. While it is critical to be competent, diligent and an excellent communicator, most successful lawyers are also viewed by their clients as personal and/or business advisors who provide valuable advice beyond the laws, statutes and regulations. Successful advisors blend their legal knowledge with pragmatic advice based on various external factors. Move beyond having a singularly myopic view of your practice, focusing only on the legal issues in front of you. Consider other market, demographic or economic trends impacting your clients; and use this information when developing your overall approach to serving clients. Becoming a sought-after advisor takes time. Generally, the longer you practice law, the more intuitive it is for you to offer advice beyond just the legal issues and analysis.

Tips:

- Read a minimum of one daily paper per day. Watch the news each evening.
- Subscribe to and read information published by the Bar Association sections to which you belong.
- Attend CLE's on topics related to broadening your perspective as an advisor.
- Meet with your clients at their place of business to learn more about their industry and business. Gaining a deeper understanding of your client's business allows you to better understand what other legal services you and your firm might be able to provide your client.
- Subscribed to and read the industry publications your clients read. Clip articles and add a personal note to your clients if an article impacts them.
- Visit the websites of your clients and their competitors on a regular basis.
- Join a trade association your clients belong to. Become an active member as well as a legal resource to others in the association.
- Take courses offered through the Bar Association or a local business school on topics such as understanding financial reports (for non-accountants), micro and macro economics for business owners, entrepreneurship, supply chain distribution, and other topics of interest to business owners and entrepreneurs.
- Watch for your clients in the news. If you see them referenced in an article, featured on television or interviewed on the radio, send them a personal note of congratulations.

Pillar II. Developing New Business

Rule 1.16 Declining or Terminating Representation

(a) . . . a lawyer shall not represent a client or. . . shall withdraw from the representation of a client if

(1) the representation will result in violation of the Rules of Professional Conduct or other law;

(2) the lawyer's physical or mental condition materially impairs the lawyer's ability to represent the client; or

(3) the lawyer is discharged.

(b) . . . a lawyer may withdraw from representing a client if withdrawal can be accomplished without material adverse effect on the interests of the client, or if

(1) withdrawal can be accomplished without material adverse effect on the interests of the client;

(2) the client persists in a course of action involving the lawyer's services that the lawyer reasonably believes is criminal or fraudulent;

(3) the client has used the lawyer's services to perpetrate a crime or fraud;

(4) the client insists upon taking action that the lawyer considers repugnant or with which the lawyer has a fundamental disagreement;

(5) the client fails substantially to fulfill an obligation to the lawyer regarding the lawyer's services and has been given reasonable warning that the lawyer will withdraw unless the obligation is fulfilled;

(6) the representation will result in an unreasonable financial burden on the lawyer or has been rendered unreasonably difficult by the client; or

(7) other good cause for withdrawal exists. . . .

It is important to be selective in choosing the clients with whom you work. Given an attorney's limited hours to devote to marketing efforts, it is critical that all marketing initiatives be focused on the prospective clients and new business opportunities that will yield the highest reward and best fit with your personal and professional objectives. This goes beyond your ethical obligation to decline or terminate some client relationships and requires that you proactively seek out the best possible clients for your practice.

Tips:

- Identify your A-level target audiences – those prospective clients who best utilize the highest level of your expertise as a lawyer.
- Create three to five statements on why you are THE best lawyer to work with your target audiences - - really focus on what makes you <u>unique</u> as a lawyer.

- Create a list of the top five clients you would like to attract in 2011; clients you are not yet working with but would like to next year
- Plan time to reach out to your top prospective clients. Identify who could introduce you or schedule a follow-up activity if you have already met

Rule 7.3 Direct Contact with Prospective Clients

(a) A lawyer shall not by in-person, live telephone or real-time electronic contact solicit professional employment from a prospective client when a significant motive for the lawyer's doing so is the lawyer's pecuniary gain, unless the person contacted:

(1) is a lawyer; or

(2) has a family, close personal, or prior professional relationship with the lawyer. . . .

While the rules governing communications with prospective clients are stringent, it is my belief the vast majority of successful marketing for lawyers is done by building relationships, not through direct mail or telemarketing. Lawyers I know are happy that they cannot cold call prospective clients. Mass communications are simply not effective when attempting to attract new business into your law office. Whether you are marketing to individuals or businesses, the key to your success in marketing is found in the strength of the relationships you build with current clients, within the community, and within your base of referral sources (accountants, bankers, doctors, therapists, social workers, consultants, satisfied clients, insurance agents, etc.). If you want direct contact, join a trade or professional association, volunteer for a community group, or in some other way forge a personal alliance or relationship with those you choose to affiliate with.

Tips:

- Be thankful you cannot cold call, telemarket, or send "blind" direct mail letters. We are not selling siding or carpet cleaning services; we are selling sophisticated legal services. There are simply more effective ways for you to attract new business!
- Join at least one association attracting prospective clients or referral sources. Become an active member of the association. Volunteer for at least one committee. Offer to speak to members on substantive legal topics of interest to them. Submit articles for publication in their magazine or newsletter. Build your relationships by attending events and extending yourself to others.
- Practice your networking skills. Remember people refer business to those they like, trust and respect. Become a high profile member of your community, offering to serve as a "free" legal resource to those in your network.
- Remember not to refer to yourself as an expert or a specialist unless you have achieved your Bar Association's designation for such specialties (Rule 7.4A).
- Market your experience by offering substantive programs to the public in the form of seminars. Offer this programming with other professionals marketing to the same group.

Pillar III. Increasing Name Recognition and Awareness

Preamble to the Rules, Paragraph 6B (Public Interest Legal Service)

The absence from the Illinois Rules of a counterpart to ABA Model Rule 6.1 regarding pro bono and public service should not be interpreted as limiting the responsibility of lawyers to render *uncompensated service in the public interest. Rather, the rationale is that this responsibility is not appropriate for disciplinary rules because it is not possible to articulate an appropriate disciplinary standard regarding pro bono and public service.*

Tips:

- Volunteering takes time and commitment. So make sure you select an organization that aligns with your personal values. Before you volunteer, consider what is important to you. What issues are you passionate about? What organizations could use your competence and experience?
- Ask lawyers and colleagues in the community for a list of non-profit or charitable organizations in areas you would like to volunteer.
- Talk to your state Bar Association. Nearly all Bar Associations offer pro bono opportunities in the form of public outreach programs.

Rule 3.6 Trial Publicity

(a) A lawyer who is participating or has participated in the investigation or litigation of a matter shall not make an extrajudicial statement that the lawyer knows or reasonably should know will be disseminated by means of public communication and would expect to be disseminated by means of public communication and would pose a serious and imminent threat to the fairness of an adjudicative proceeding in the manner. . . .

Tips:

- Proactively communicate firm events including the announcement of new partners, new lawyers joining the firm, awards received (like Super Lawyers, Rising Stars, and many others), a merger with another firm, community and board affiliations of lawyers.
- Develop article ideas relevant to a particular audience and actively pitch the story to a publication willing to publish the article. Generally bylined articles begin as an outline which is then presented to the editor with the rationale of why readers of his or her publication need to know the information contained in the article. Only when the article concept has been accepted by the publication should the lawyer actually begin writing.
- Another way to utilize public relations in a law firm is to define a broad issue that has not received adequate attention in the press. If you work with a public relations professional, that person will work with you to define the pitch, develop the concept and contact editors and reporters he/she knows will be interested in the story.
- Reporters are always looking to find objective subject matter experts they can call upon when covering a story. Many times having the reporter talk with you will result in you being quoted (and hopefully the name of your firm too!).

Rule 6.3 Membership in Legal Services Organizations

A lawyer may serve as a director, officer or member of a not-for-profit legal services organization, apart from the law firm in which the lawyer practices . . . .

Tips:

- Identify which organizations mesh with your interests and begin investigating the process of becoming a board member. Contact the executive director of the organization(s) and ask about board nomination or the volunteer process. If in doubt, always begin by volunteering for the organization; and then as you build relationships, volunteer to serve on the board.

- Attend all meetings sponsored by the organization and use your pro bono work to refine your skills in the areas of competence, diligence, communication and serving as an advisor to the organization.
- Go to Board Source, www.boardsource.org, formerly the National Center for Nonprofit Boards, for practical information, tools and best practices, training, and leadership development for board members of nonprofit organizations.

Pillar IV. Targeted and Effective Communications

Rule 1.4 Communication

(a) A lawyer shall:

(1) promptly inform the client of any decision or circumstance with respect to which the client's informed consent, as defined in Rule 1.0(e), is required by these Rules;

(2) reasonably consult with the client about the means by which the client's objectives are to be accomplished;

(3) keep the client reasonably informed about the status of the matter;

(4) promptly comply with reasonable requests for information; and

(5) consult with the client about any relevant limitation on the lawyer's conduct when the lawyer knows that the client expects assistance not permitted by the Rules of Professional Conduct or other law.

(b) A lawyer shall explain a matter to the extent reasonably necessary to permit the client to make informed decisions regarding the representation.

Tips:

- Set communication expectations up front with your clients. Find out how your client prefers to be communicated with (via telephone, e-mail or letter) and consistently follow through.
- Show clients you are on top of their matter. Regularly (each week or month, depending upon the size and duration of the matter) send a brief email or written communication summarizing highlights, next steps, action items, and pending activities.
- Return your telephone calls within four hours. If you cannot returns the calls, make sure someone in your office returns the calls on your behalf.
- Reply promptly (same day) to emails you receive from your clients.
- It is okay to let clients know there is nothing new to report. It is better to do this than not return a phone call.
- Call a client for whom you have recently completed a transaction or case just to see how well his or her expectations were met.
- Ensure your support staff has the opportunity to meet your clients. The more your assistant and paralegals can step in to help you communicate, the more likely your clients will feel taken care of.

Rule 7.1 Communications Concerning a Lawyer's Services

A lawyer shall not make a false or misleading communication about the lawyer or the lawyer's services. A communication is false or misleading if it contains a material misrepresentation of fact or law, or omits a fact necessary to make the statement considered as a whole not materially misleading.

Tips:

- Do not imply results generated for a client can likely be generated for another.
- Do not compare your services to those of your peers and colleagues in other firms.
- Do not cite fees in your communications or advertising.
- Focus on other communication strategies to build your name recognition (beyond advertising) like speaking to community and business groups, and publishing articles in publications read by current and prospective clients.
- Regularly review and update your biography. Enlist your assistant to automatically add speaking engagements, published articles, and new professional affiliations to your professional biography.
- Develop as many substantive examples of representative experience as you can and add them to your biography. Use them in your website, proposals, or to give to prospective clients and referral sources. Include:
    - The Client's Industry.
    - The Client's Situation (the problem).
    - Your Approach (the solution).
    - The Results Achieved.

Rule 7.2 Advertising

(a). . . a lawyer may advertise services through written, recorded or electronic communication, including public media. . . .

Tips:

- How do your competitors market? Are you advertising simply because everyone else is doing it?
- On your file opening and new matter reports, find out how clients heard of you and your firm. If advertising is in the top five responses, it is likely delivering a return on your investment; if not, look for other creative ways to reach your prospective clients (such as publishing articles and making presentations).
- What unique messages are you using to advertise your firm? If they sound like everyone else's messages, you need to focus on why clients hire you and your firm, and let those messages be reflected in your advertising.
- Consider other methods for building your name recognition, including tapping into the "free" coverage associated with writing bylined articles or being interviewed. Public relations is simply more credible and cost-effective than advertising because it carries with it the third party endorsement of the media outlet you are featured in.

Part II - Develop an Ethical Marketing Plan: A Tool for Illinois Lawyers

Identify Your Best Contacts

Current Clients

Create a list of your top ten current clients; those with whom you could do more work in 2011

Prospective Clients

Create a list of the top ten clients you would like to attract in 2011; clients you are not yet working with but would like to

Referral Sources

Create a list of your top ten referral sources - - those you would like to continue building a relationship with

Current Clients	Prospective Clients	Referral Sources
1.	1.	1.
2.	2.	2.
3.	3.	3.
4.	4.	4.
5.	5.	5.
6.	6.	6.
7.	7.	7.
8.	8.	8.
9.	9.	9.
10.	10.	10.

Create your Audiences, Messages and Marketing Objectives

Client Criteria and Target Audiences

Identify your A-level target audiences – those prospective clients who best utilize the highest level of your expertise as a lawyer.

A-Level Client Criteria

If you were to tell a referral source what type of client to refer to you, how would you define your A-level client criteria?

Industry: ____

Type of company or individual: ________________________________
Number of Employees: ______________________________________
Job or position: ____
Type of Legal Issue: ____

Referred by someone you trust? Yes_____ No_____
Would you refer this person/company? Yes_____ No_____
Do you like, trust, and respect this person? Yes_____ No_____
Do they have realistic expectations? Yes_____ No_____
Are they responsive/easy to work with? Yes_____ No_____
Will they accept advice (or resist it)? Yes_____ No_____
Do they see the value you bring as an attorney? Yes_____ No_____
Other criteria:
____
____
____

Define Your A-Level Target Audiences

Individuals: ____

Industries: ____

Companies: ____

Other: ____

Key Messages

Create three to five statements on why you are THE best lawyer to work with your target audiences - - really focus on what makes you unique as a lawyer.

Describe What Makes you Unique

What makes you unique? ____
Why should an individual work with you? ____
What do your clients value most about you? ____
What makes you a better choice than other attorneys? ____
What are the highest level skills you bring to your clients? ____
What unique skills do you offer clients in this economy? ____
Other key "Hire Me"
Messages:____
Key messages on what makes you unique as a lawyer and why clients should hire you:

1.____

2.____

3.____

4.____

5.____

Marketing Objectives

Identify your specific objectives for 2011 in the categories of:

I. **Retaining and Growing Relationships with Current Clients and Contacts**

Client Service:____

Client Satisfaction:____

Cross Marketing: ____

Referral Source Development: ____

II. **Attracting New Business**

Networking: ____

New Business
Development:____

Proposal Development: ____

Market Research: ____

Trade and Professional Association Involvement: ____

____

III. **Increasing Your Name Recognition in the Marketplace**

Advertising: ____

Branding: ____

Public Relations: ____

Trade Shows: ____

Community Involvement: ____

Social Networking: ____

IV. **Pursuing Targeted and Effective Communications**

Client Communications: ____

Marketing Database: ____

Website: ____

Client Events: ____

Create Your "Real" Business Development Goal

Identify what amount of revenue you want to generate in 2011 in new business.

Financial Analysis

New Business Development Goal: $___________________________

Client Name	2009 Revenue ($)	2010 Revenue $)	2011 Revenue (projected $)	Comments
TOTAL Projected Revenue	$	$	$	

- Subtract total Projected Revenue

Real 2011 New Business Development Goal $ ______________________________

Other Revenue Goal Comments:

____

____

____

Develop your Marketing Action Plan

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

Your Retain and Grow Relationships Action Plan

Identify five activities you will do in support of the objectives you created on page 14:

1. ____
2. ____
3. ____
4. ____
5. ____

When in Doubt, Ask Your Clients

Select Clients to Interview:

1. ____
2. ____
3. ____
4. ____
5. ____

Develop your Questions:

- What are the biggest legal concerns you have for 2011 - - What keeps you awake at night?
- What publications do you read on a regular basis?
- What do you value most about working with me as your lawyer?
- With whom do I compete to earn your business?
- Where do you see your business in five years?
- What groups are you active in (industry, social, professional, community, athletic, etc.)?
- Based on past experience, what frustrates you most about working with lawyers?
- How can I (and my team) better meet your needs?
- What are the five most important traits and characteristics your lawyer needs to have?
- How well do I perform in each of these areas?
- Knowing what you do about me and my practice, would you refer me to your contacts?

Make your Services "Must Have" with Clients

Identify the services you offer that are most important to clients in this economy. Click here to review our **Blog Post on this topic**:

1. ____
2. ____
3. ____
4. ____
5. ____

Your New Business Development Action Plan

Identify five activities you will do in support of the objectives you created on page 14.

1. ____
2. ____
3. ____
4. ____
5. ____

Create your Elevator Speech

- Summarize in one simple sentence what you do or what services you provide
- Give an example of the value you deliver to your clients
- Describe the benefits that your firm/you provide; List the features that set you apart from your competition
- Identify what makes you unique in one sentence
- What do your clients appreciate most about working with you?
- Give an example of a successful outcome from serving a past or current client

Combine responses for an introduction which focuses on the value and results you generate for your clients!

Do Your Research

Pick a prospective client or referral source and research them using **www.WarmCallCenter.com**:

Client Name: ____
Industry Information: ____
Company Information: ____
Individual Information: ____

Join a Group and Be Active

To what trade, professional, social, business, or other organizations do you currently belong?

Organization Name	Your Role	Opportunities for Involvement

What groups serve your current clients, prospective clients, and referral sources? Join and regularly attend meetings (see your client interview responses on page 16 above)?

Organization Name	Industries and Clients Served	Opportunities for Involvement

Your Increase Name Recognition Action Plan

Identify five activities you will do in support of the objectives you created on page 14.

1. ____
2. ____
3. ____
4. ____
5. ____

Stay Involved in Your Community

Take a look at your current volunteer efforts and rate yourself in the following areas. Give yourself a letter grade, A-D (A= weekly B=monthly C=quarterly D=annually). How often do you:

_____ Provide services to those less fortunate
_____ Sponsor an event in the community
_____ Serve on a non-profit board and regularly attend meetings
_____ Volunteer in the community
_____ Contribute legally to an organization you support

Volunteering Resources

Board Source – Formerly the National Center for Nonprofit Boards, this is the premier resource for practical information, tools and best practices, training, and leadership development for board members of nonprofit organizations worldwide.

Access a national database to help you find a wide variety of charitable organizations and IRS-recognized non-profits:

GuideStar – trusted information on non-profits
Charity Navigator **-** America's premier independent charity evaluator, works to advance a more efficient and responsive philanthropic marketplace by evaluating the legal health of over 5,400 of America's largest charities

Use a national volunteer clearinghouse to help you find specific ways to get involved in your local community – from volunteering and donating money, to getting involved with the issues they care about.

Network for Good – Online donation site
Volunteer Match – Find a place to volunteer
Volunteer Solutions – sponsored by United Way
1-800-Volunteer – a service of the Points of Light Foundation
Federal Government volunteer opportunities – this site lists volunteer opportunities at national parks, forests, and monuments

Notes:
____
____
____
____

Take the Plunge into Social Networking

Check the social networking activities you currently participate in (select all that apply):
_____ LinkedIn
_____ Facebook
_____ Twitter
_____ I Publish a Blog
_____ I read others' Blogs
_____ I participate in Social Networking groups (on Linkedin)
_____ I use Google Alerts
_____ Other: _________________

Other social networking resources:
Link: Social Networking Sites on Wikipedia
Book: The New Rules of Marketing and PR, November 2008, David Meerman Scott
Book: World Wide Rave, March 2009, David Meerman Scott
Book: Social Media Marketing: An Hour a Day, October 2008, Dave Evans and Susan Bratton
www.Delicious.com – Social bookmarking site
10 Ways to Use LinkedIn, Guy Kawasaki,
www.Ping.fm – Social media communicator to multiple sites
www.socialoomph.com – Preplan your Tweets
www.Wordpress.com – blog spot
www.Typepad.com – blog spot

Focus on the Media, Not on Advertising

Four concepts for attorneys to keep in mind:

1. Keep members of the media current on happenings at your firm (through regular news releases)

2. Talk to editors and reporters about being a knowledgeable source they can consult when covering stories involving your highest-level expertise

3. Develop a timely and relevant story angle and "pitch" editors and reporters to interview you

4. Identify specific ideas for articles you believe their readers, viewers or listeners need to know, contact the editors, and tell them why you are the best professional to write an article or to be interviewed on the given topic.

Identify topics of interest to your clients and your approach to the issue:

Subject/Topic	Your Messages about the Topic	Potential Publications to Target

Your Targeted Communications Action Plan

Identify five activities you will do in support of the objectives you created on page 14:

1. ____
2. ____
3. ____
4. ____
5. ____

Update your Professional Biography

When did you last update your biography? ___ last week _____ last month _____ last year _____LONG time ago

Does your biography include organizations in which you are active? _____ Yes _____ No

Does your biography include examples of the work you do for your clients and the results you help them achieve? If not, create and post some well written pieces of Representative Experience:

Create Your Representative Experience

Clients want to see that you have done what they need. Don't just create a bulleted list of services; show your clients the results you deliver by creating pieces of representative experience in the following format:

Client Type:
Client Goals:
Your Approach:
The Result:

Client Type:
Client Goals:
Your Approach:

Client Type:
Client Goals:
Your Approach:
The Result:

Client Type:
Client Goals:
Your Approach:

The Result: The Result:

Continue Communicating with Your Clients

Identify timely, relevant topics affecting your clients (see responses to your client interviews):

____

____

____

Now, summarize the impact of that topic on your clients and send it to them in the form of a personal email. Repeat on a quarterly basis.

How Is Your Website?

As you consider the effectiveness of your website, ask yourself the following questions:

- What year was your website originally launched?
- How many major enhancements have you made to your site since its launch?
- How often do you add content to your site?
- On a scale of 1-10 (10 highest) how visually appealing is your website?
- On a scale of 1-10 (10 highest) how dynamic is your website (versus static and unchanging)?
- As an objective visitor, what letter grade would you give your current website based on those of your competitors?
- Do you use web-tracking analytics software like WebTrends or Google to analyze traffic to your site each month?
- How do you drive traffic to your website? What are your ongoing plans to promote your website?
- When you do a Google search, where do you (and your firm) show up on Google and other major search engines?

Create Your Current Client Action Plan

Review the current client contacts you identified on page 12, and plan one follow up activity per contact; set a date for when you will follow up with each person and what your message will be.

Current Client Name	Activity	Completion Date	Message

Create Your Prospective Client Action Plan

Review the prospective client contacts you identified on page 12, and plan one follow up activity per contact; set a date for when you will follow up with each person and what your message will be.

Prospective Client Name	Activity	Completion Date	Message

Create Your Referral Source Action Plan

Review the referral source contacts you identified on page 12, and plan one follow up activity per contact; set a date for when you will follow up with each person and what your message will be.

Referral Source Name	Activity	Completion Date	Message

Notes:

____
____
____
____
____
____

For more information contact:

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Terrie S. Wheeler, MBC, serves as Director of Coaching for Ingenuity Marketing Group, LLC, in Saint Paul, MN. In January 2011 Terrie merged her 15-year consulting practice into Ingenuity Marketing Group to focus on what she does best: providing personal marketing coaching services to clients in numerous professional services industries.

Legal Industry Marketer - Terrie's career began as a law firm marketing director for three Minnesota law firms (Larkin Hoffman Daly & Lindgren; Maslon Edelman Borman & Brand; and, Popham Haik Schnobrich & Kaufman), where she strategically assisted law firms, regional offices, practice groups, industry groups, and individual attorneys to pursue highly targeted, and results-oriented marketing activities. Terrie spent two years as an investigator and on the screening committee of the Hennepin County Bar Association's Fourth District Ethics Committee, and served as Chair of the Minnesota State Bar Association's Marketing and Client Service Section.

Founder of PSM, Inc. - In 1996 Terrie founded Professional Services Marketing, Inc. (PSM), a firm delivering outsourced marketing and coaching services to professional services firms. For fifteen years, PSM and its team of over twenty professionals served clients in the legal, accounting, banking, education and other services industries. Personally, Terrie coached scores of lawyers, CPAs, bankers, financial advisors, and many other professionals on how to create lucrative and rewarding practices.

Creator of Web-Based Marketing Coaching Tools - In 2007, Terrie launched an innovative web-based marketing coaching tool for lawyers in the US and the UK – **www.MarketYourLawPractice.com (**MYLP) and **www.MarketYourLawPractice.co.uk** (MYLP.co.uk). In addition, Terrie launched **www.MarketYourAdvisoryPractice.com** for financial advisors. Terrie's websites replicate the marketing coaching process Terrie has refined over 20 years.

Law School Educator - In January 2011, Terrie was asked to participate as a faculty member for an accredited course offered at Hamline Law School*, The Business of Lawyering*. Terrie will be presenting all content related to marketing and new business development to third year law students going into private practice. Terrie is also working with the

University of St. Thomas School of Law on various programs designed to educate lawyers on ethical marketing strategies.

Involved Community Member - Terrie currently serves on the board of directors for **The Family Tree Clinic** in Saint Paul, MN, and on the advisory board for Bloomington, MN-based **Experienced Resources, LLC**. In the past, Terrie has volunteered her time as a board member for various organizations including **Tradition Capital Bank**, **Camp Courage**, and **Family Pathways**.

Education - Terrie is a *summa cum laude* graduate of the University of St. Thomas' Graduate School of Business (MBC), and a *magna cum laude* graduate of Concordia University in St. Paul.

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