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Fourth Quarter Marketing: Refocus and Get Serious

By [Donna Erickson](#)
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The year is quickly slipping by and you didn't devote the time to client relations and marketing that you had intended. Don't give up! It's not too late to make a difference this year and to start the new year off on the right track!

Personal Discipline

Keep these three points in mind as you start each week:

1. **Focus your efforts.** Identify your non-billable priorities for the quarter on a planning worksheet.
2. **Manage your time.** Identify how much time you are willing to commit to marketing activities and set aside time each week to accomplish your objectives. This could be breakfast, lunch, dinner, evenings or weekends, depending upon your schedule.
3. **Weekly lists.** Start by targeting at least three non-billable marketing events each week. Create a list detailing your specific objectives. Check off the list those activities that you complete, add new items as appropriate, and carry them forward to the next week.

Key Areas to Address

Focus on these key components of business development to improve your business relationships:

Expand existing client relationships. Review your list of open clients. Who would you like to continue working with long into the future that has the potential to send you good work? Make a bullet list of what you will do to further develop the relationship:

- Clients want their lawyers to understand their business. Make the effort to do so.
- Keep abreast of their industry, challenges and opportunities, current and future.
- Find out what business issues keep them up at night and address how you can be of assistance in relieving that stress.
- Determine what you can do to help them be successful.
- Offer to meet at their office rather than your own.
- Make it a point to review the client's web site before every meeting to stay current with public news.
- Write down a few activities that you could do to expand that relationship in the coming months: lunch, dinner, theatre, golf or attend a ball game. Is there an opportunity for you to co-present with the key contact at a seminar or trade association event?

Reconnect with past clients. Review a list of clients from two years ago that you did not work for in the last twelve months. Identify those that you would like to continue working with that have the potential to send good, profitable work in the future.

- What can you do to expand your relationship and start the files coming your way once again?
- Pick up the phone and talk to them.
- Visit them at their offices.
- Don't rely on e-mail to reconnect.

Ask how you are doing. Take the time to talk with your client at the conclusion of each matter or case and debrief to hear the client's perspective on the outcome, as well as how well they liked working with you and your firm. Asking their opinion goes a long way to building a trusting, open relationship for the future. In addition, clients appreciate being asked their opinion and may be motivated to use the firm for additional services.

- If they are highly satisfied, they will surely tell you.
- If not, you should ask questions to draw out their opinions and find out how you and the firm can improve your services.

Show clients your appreciation. Thank clients for their business.

- Many firms send a holiday card or year end gift. I prefer the lawyer to call their clients and say thank you.
- Perhaps take your client to lunch or a special dinner.
- If appropriate and not prohibited by their company policies, send your client a gift that recognizes one of their hobbies or special interests.
- Say thank you to their staff by sending a custom basket of fruit, cookies or other treats that can be shared.

Develop a list of your good referral sources.

- Contact each person and set up a time to get together.
- Remember to thank them for specific clients they have sent your way, or attempted to send your way, in recent months.
- Have you reciprocated with a referral recently? Reciprocal referrals are important components of many such relationships. A good referral relationship is a two way street. If your practice does not lend itself to generate referrals their way, find other ways that you can say thank you for their thoughtfulness.

UPDATE MARKETING PLANS

At least annually, marketing plans should be updated for the law firm, practice groups, and each attorney.

Be sure that the plans address current economic conditions, including practical, attainable objectives that will help you to retain your good clients and bring in new clients.

For assistance with planning and implementation, client satisfaction surveys or other marketing and business development initiatives, contact [Donna Erickson](mailto:Donna@EricksonMarketingInc.com) at 612-669-5548 or Donna@EricksonMarketingInc.com



About the Author . . . Donna Erickson is the President of Erickson Marketing, Inc., a national full-service marketing consulting firm working exclusively with law firms. She has more than 20 years of hands-on experience developing and implementing effective marketing initiatives in law firms, both large and small. Donna is a charter member and past-president of the Minnesota Chapter of the Legal Marketing Association and can be reached at +1. 612. 669. 5548, Donna@EricksonMarketingInc.com, Erickson Marketing, Inc., P.O. Box 490758, Minneapolis, MN 55449.



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