

## Second Quarter Marketing Checklist

By Sharon Berman

As professionals, we are so focused on what's in front of us that it can be hard to believe we are already in the second quarter of 2012. The beginning of the second quarter, however, is a good time to stop, take a breath, look back at the first quarter's marketing results, and determine what, if anything, needs to be adjusted in order to improve.

At this time of year, you have two significant advantages — a quarter of data to give an indication of this year's opportunities and challenges, and if you haven't yet built momentum, it's time to adjust and make things happen. You can use the data as a guide to what's working and what's not and where the gaps are. If things are heating up, you can use the first quarter momentum as a springboard to make this a great year.

The following can help you evaluate your marketing plan to date and determine next steps.

Evaluate the results of your first quarter marketing in terms of number and quality of leads. The ability to evaluate this information underscores the need for a mechanism to capture your lead-generation results — not just those for new business. If you don't have a system in place, start with an Excel spreadsheet and commit to keeping track of your leads. Ideally, this should be done on a firm-wide basis. Do the same for your sales efforts; tracking prospects who have become clients.

Consider what this information means to your marketing results. While one quarter is a relatively short period, it is worth analyzing. Is there anything surprising in your analysis? Does it track last year's results in



terms of where your best leads are coming from? What marketing tactics might warrant further investments? Let's say that you received a couple of quality leads through your website, but know it needs more work in terms of search engine optimization. That would seem a smart place to increase your budget.

Revisit the list of marketing resolutions or goals you most likely made for this year. With several months of reality under your belt, you can consider these more realistically. Sometimes you find that what looked good on paper has been challenging to implement. If that's the case, it doesn't mean failure. It means revising your tactics and winnowing down what you can do for the balance of the year.

Take a hard look at this upcoming quarter — and plan it in detail. Although you need to plan for the balance of the year, you'll find it easier to address a relatively short period as opposed to looking at the remainder of the year. If you plan to schedule two webinars over the next quarter, for example, get focused regarding how that will happen, who is responsible for each aspect and what the timing of each activity is.

Separate short-term and long-term projects. For instance, if obtaining speaking engage-

ments to target audiences is a key element of your marketing program, now is the time to identify and reach out to decision-makers for conferences later this year and especially for next year's conferences. Speakers for this year's conferences were booked months ago.

Consider how you can systematize your marketing. Systematized and disciplined marketing can make the process easier and less stressful. If you haven't already, consider how you can schedule the next three months so you know what happens when — for instance, your e-newsletter goes out the first Tuesday of the month, or Monday and Fridays are your days for blog posts.

Keep your marketing materials up-to-date so that they showcase you and your firm today. Think about your firm's noteworthy events for the first quarter — deals transacted, settlements, new hires, etc., and how they should be incorporated into your website, social media, and hard copy materials. What material needs to be updated? How can these events be leveraged further? To illustrate, if you've had new hires or promotions, decide whether you should issue a press release and/or announce the news via social media. Are these team members' biographies and headshots up-to-date on your website? Do they warrant a write-up in your upcoming newsletter?

If you know your website needs an overhaul

*(continued on back)*



**Sharon Berman** is principal of Berbay Corp., a marketing and public relations firm specializing in working with professional services firms. She can be reached at [berman@berbay.com](mailto:berman@berbay.com)

## Second Quarter Marketing Checklist *(continued)*

but there is so much to do that you don't know where to start, focus only on completing updates from the first quarter. Add news or success stories. Taking the time to update your site so that it reflects the first quarter will make redoing, or "refreshing," it that much easier.

If redoing your website is one of your long-term goals for this year, then now is the best time to start. If you plan to revamp your website now, with months ahead of you, you can still achieve your goals this year. However, do not delay. Involved projects like this always take longer than you think or would like. It's helpful to have a firm deadline, such as Dec. 31, to motivate you.

Look at your marketing calendar for the balance of the year and make sure you have key events highlighted, including upcoming speaking engagements and conferences you're planning to attend. Look ahead and determine when you need to start making the most of these events and who else needs to be involved. For example, if you're exhibiting at a conference, confirm that your

booth and materials are ready, so that it doesn't become a crisis. It also may be time to start inviting clients, prospects, and referral sources for meetings during the event.

Examine your seasonal marketing initiatives. You may want to do something around certain corporate or personal tax due dates. Are there initiatives you considered last year, but at a time when was too late to put them into play?

Consider nominations and rankings. Obtaining a spot on "top" lists among lawyers, dealmakers, or other professional groups has become very important to many attorneys, and some of those lists have longer lead times than others. Find out when the lists you're interested in will be published. Then, find out when the outlet starts gathering the information. Remember that these deadlines can vary from year to year.

Your first quarter marketing review may have indicated that you need more resources to support your marketing. If this is

the case, explore internal resources that might be available to you. Sometimes, for instance, an administrative assistant has an interest in marketing and would like to help out if asked. Perhaps the marketing department at your firm's main office will provide some additional support if you made that team aware of your need.

It could also be that you're shouldering the business development mantle all by yourself. Offer additional training to other attorneys in your office, if necessary, so that they can contribute to generating leads. It also may be that you need to cut back and reprioritize.

As lawyers focusing on keeping clients satisfied, it's easy to get caught up in accomplishing day-to-day tasks. This tendency highlights why it's critical to check in periodically, such as at the end of each quarter. After all, as the adage goes, what's the use of running if you're on the wrong road? A regular evaluation can help you confirm that you are on the right path. ■

*Reprinted with permission from the "April 2012" edition of the "The Recorder" © 2012 ALM media Properties, LLC. All rights reserved. Further duplication without permission is prohibited. For information, contact 877-257-3382, [reprints@alm.com](mailto:reprints@alm.com) or visit [www.almreprints.com](http://www.almreprints.com).*

For more information on law firm and attorney marketing, contact Berbay Corp:

**Phone:** 310-405-7345 **Website:** [www.berbay.com](http://www.berbay.com) **Blog:** [www.blog.berbay.com](http://www.blog.berbay.com)

**Facebook:** [www.facebook.com/group](https://www.facebook.com/group) **Twitter:** [@BerbayCorp](https://twitter.com/BerbayCorp)

**LinkedIn:** [www.linkedin.com/in/sharonberman](https://www.linkedin.com/in/sharonberman) **Email:** [berman@berbay.com](mailto:berman@berbay.com)