

Legal Services Brand Building

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Your Brand, In Five Easy Steps

Posted by [Jerry Touslee, VP Marketing](#) on Nov 6, 2015 9:30:00 AM



Step #1

In my younger days in the business of marketing and advertising, I was in a meeting with the Brand Director at Microsoft. When someone in the meeting referenced a brand project as “something we need to do” the Brand Director quickly corrected that person and said, “Our brand is not something we do. It’s who we are.” Profound? Sure. But it’s also very instructional when it’s time to think about your brand.

In a series of blog posts, I’ll outline what I consider to be the five most important steps in developing a brand vision for your law firm. One that makes you say “That’s who we are.”

But first, let’s quickly define what a “brand” is. It’s actually many things:

A relationship or connection

A reason to believe (and choose)

A set of expectations

A promise

An identity or image

A reputation

[A story](#)

So what’s the most important definition? Ask a bunch of brand experts and you’ll get a bunch of different answers. Here’s how I recommend you think about the idea of “brand”:

It’s a relationship one has with a product, service, or company.

Why that definition? Because, to me, if you think about someone (or a large group of someones) having a relationship with your brand, you’re more likely to act in a way that can build it into something stronger and more valuable. The business of practicing law is built on [building relationships](#), so why not think of your brand in the same way?

Now, on to the steps you should consider to identify and build your brand.

Step 1: Determine Your Values

Values are at the very heart of every brand (if it’s an honest brand, that is). And it’s an important place to start as you begin your brand thinking. In the words of Steve Jobs:

“To me, marketing is about values. This is a very complicated world, it’s a very noisy world. And we’re not going to get the chance to get people to remember much about us. No company is. So we have to be really clear on what we want them to know about us.”

So what makes your firm tick? What’s your firm’s “DNA”? What guides you and your business decisions? How do you use values to [tell your brand](#) story? I’ll give you a couple of “big brand” examples of brand values.

Starbucks:

This global brand defines their brand values as: Welcoming. Genuine. Knowledgeable. Involved.

Southwest Airlines:

The world's largest low-cost air carrier claims the brand values of: Freedom. Service. Fun.

Make sense? Do you see those values reflected in those brands? So now the challenge is to come up with 3-5 values-based words that accurately reflect what you believe your business is all about. Be careful not to write a mission statement. And work hard to avoid cliché words like "Innovative" or "Passionate." Dig deep. Be creative. And most of all, be honest.

Next time: Step #2 – Make a Promise

Identifying Your Brand Assets: Start With Your Senses

Posted by [Jerry Touslee, VP Marketing](#) on Mar 23, 2015 12:32:00 PM

Socrates, the classical Greek philosopher, would have made a great marketing man. Like any successful marketer, he understood that before you look across the horizon with your world-shaking plans, look within.

That's where marketing plans are born. They start with a careful, comprehensive review of one's brand assets, one's personality. As a [legal professional](#), where the brand is ultimately you, this process calls for a high degree of objectivity. Not an easy thing to do.

Here's a thought to keep in mind as you begin your assessment: Your clients don't purchase your brand. They experience it. And they experience it as all of us do, through our senses. As you work to identify your brand assets I'd recommend you try some role-playing. Step for a moment into your client's shoes and ask yourself these three questions: "To this target individual and key part of my business, what does my brand 1) ... feel like? 2) ... sound like? and 3) ... look like?"

1) What does my brand feel like?

Maya Angelou said "I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel." The emotional component is a powerful asset in any brand. Ask yourself: What benefits am I providing my clients (ex. delivering on promises, meeting/exceeding expectations, etc.) and how do they feel about their experience with me? Warm, comforted, encouraged, secure?

2) What does my brand sound like?

How does it sound when you talk to your clients, on the phone or in person? What are the features, the promises that you offer? Does it sound dependable, reassuring? Does it sound informed, in control? Does it sound like you've added value? Does it sound like an attorney your clients would [recommend to](#) their family and friends (perhaps the most important sound of all)?

3) What does my brand look like?

A brand's appearance can be a pretty elusive thing. Your brand is not a logo or trademark, color palette, or the masthead at the top of your website. While all of these contribute to

your visual identity, there's more. It's how you present yourself – your wardrobe choice, your office setting, the documents you create and present. Do they add up to a consistent look? Does everything your client see and experience look like the trusted legal advisor you want to be? Are you visually instilling the qualities you wish to convey: confidence, pride, service-minded, professional?

Write your answers down, organized by the three questions above. Review them. Edit and revise them. If you can, run them by a trusted client or a business associate who knows you and your practice. Ask them the three questions and maybe incorporate their answers. Make sure what you end up with is credible, but also a little aspirational. When you have a final “sensory” inventory of your brand assets, you'll have a clearer sense of your brand portrait or personality. You're now ready to start crafting your marketing message, a topic I'll be addressing in a future blog.

Design: A Great Legal Marketing Investment for Your Law Business

Posted by [Mary Olson, Creative Director @ WealthCounsel](#) on Nov 13, 2015 1:21:21 PM

Though you might not have thought about it yet or don't believe you need to — the look, or the design, of how you present your practice is critical to building your business. It is an important business investment. But it's hard to know when new design is needed for your law firm when you're the one running the business every day. That's why thoughtful, proactive planning and appropriate resources can pay long-lasting dividends. In fact, it's an important element to business success.

What is design?

Think of design as the *visual identity* of your brand. Design is how you visually express your practice to the public. It's usually the first impression clients will have of you and your business. That's why it's crucial to be intentional about the design of your brand.

Paul Rand, the celebrated graphic designer who created logos for IBM, UPS, and ABC, among others, reminds us “design is the silent ambassador of your brand.” Your visual identity is already communicating things about you and your practice to current and potential clients from the get-go.

Design includes your logo, but goes far beyond this. It involves all aspects of your visual representation like color scheme, images, layout, font choice, and other graphical design elements. This can be reflected on everything from your website to your letterhead, business cards, promotional material, and any documents shared with clients or the public.

You've heard that a picture is worth a thousand words. Design as your visual identity speaks volumes. So your design should [help tell your story](#). It conveys important things about you and your practice.

How do I get started?

Since design is such a vital aspect of your brand, we recommend hiring a professional to help. Now's not the time to cut corners. This is an important investment and demands expert involvement.

Dr. Ralph Speth, CEO of Jaguar, cautions us that, "If you think good design is too expensive, you should look at the cost of bad design." In the long run, poorly conceived and executed design strategies can detract from business.

When building a house, you'd consult an expert engineer to create the foundation. Without this, the structure would suffer over time and never live up to its full potential. In the same way, as you build your practice, you deserve professional guidance, since design is one of the cornerstones to your brand.

What do I do with it?

Once you've worked with a professional to craft your design strategy and visual representation of your brand, what's next? Here are four action points:

Be consistent: Have a plan or guide for how you will use your design. This can guide everyone in your organization. It's easy to get sidetracked, so put a plan in place to keep you on target and be consistent.

Own it: Embrace your design strategy as an expression of your identity. This is [part of your brand](#) and how you and your practice are presented to the world. Come up with a design that you're proud of and stand by it.

Protect it: Your design represents you to the public. Don't take it lightly. This means legally protecting the rights to your brand identity and design if need be. It also means giving good thought to the design and making sure it reflects your professionalism and integrity.

Use it: Design is a key way for you to "speak" about your brand. So don't be silent. Your design plan should include concrete ways to represent your identity on your marketing materials, website, and other areas. You've made the great investment—it's time to reap those returns.

Follow these steps and you will have taken a big leap forward for the image and reputation of your law practice. Learn more about how WealthCounsel's [practice building and legal marketing resources](#) can help you create your design to grow your law practice

[Want to Build Your Business? Tell a Story.](#)

Posted by [Mary Olson, Creative Director @ WealthCounsel](#) on Jun 29, 2015 5:03:57 PM

After investing the time and energy to [create an identity](#) and [establish yourself in your particular market](#), it's important to continually nurture and support your brand with consistent, compelling messages. Messages that remind your various audiences – [current and prospective clients](#), [referral sources](#), [media sources](#), etc. – who you are, what you

stand for and what makes you special.

One of the more unique and effective ways to deliver your message is through storytelling. A strong story well told can really resonate with an audience. It can help make your business and the work you do tangible and real to prospective clients. It can also help you in earning the trust of valued referral sources. Last but not least, a powerful story is a reminder to your current clients that in choosing you they made the right decision.

You've heard it said many times: Everybody loves a good story. Stories have always fascinated people and they're often more easily remembered than a list of facts. So what makes a good story for your business and brand? Three things: emotion, truth and relevance.

First, the story you tell should be more than just a factual account. It should have an emotional appeal, something that makes the person want to "lean in." Second, the story needs to be a truthful account, drawn from real experience. And third, the story should be relevant to the person(s) receiving it. The more your audience can see themselves (or people just like them) in your story, the more relevant it is.

There is actually one more essential part of successful storytelling: simplicity. It may be tempting to present a list of examples, each illustrating one of your many strengths and assets, but effective, memorable stories are simple. Not necessarily short, but always well-focused. Steve Jobs had an interesting view on focus:

People think focus means saying yes to the thing you've got to focus on. But that's not what it means at all. It means saying no to the hundred other good ideas that there are. You have to pick carefully. I'm actually as proud of the things we haven't done as the things we have done. Innovation is saying no to 1,000 things.

Want to see your business grow and prosper? My advice: Identify and craft your singular story, tell it well and repeat it often. You'll find it to be a great way to create new business relationships and strengthen current ones. That's the power of storytelling. Learn more about how WealthCounsel's practice building and legal marketing resources can help you create your compelling story to grow your law practice

[Video & Legal Marketing: Tips to Tell Your Story](#)

Posted by [Mary Olson, Creative Director @ WealthCounsel](#) on Jul 29, 2015 3:39:50 PM

Explosive. That's the word that comes to mind when I think about the growth of video in our world today.

Television might still be where many people go to be entertained, but make no mistake. New entrants in video are building audiences without the heavy costs attached to the traditional TV model. The fact is we live in a visually driven world. From music, news and sit-coms to commercials and college coursework, video has become a huge delivery mechanism.

How huge? [Recent research](#) results from ComScore Video Metrix show that 188.6 million Americans watched online video content via desktop computers in February 2015.

Why video for your [practice development](#)? Bringing a visual dimension to your story will flesh out your brand's personality. It adds a face – and a voice - to the name. And here's the

best news of all: Creating video content is no longer just for the big fish or the “pros.” It’s available to you and me. Call it, if you will, the democratization of video. This once specialized, cost-prohibitive industry is now well within the means of most anyone. What’s more, there are now scores of affordable video production houses ready to assist you.

Here are just a few video applications for your website that you might want to consider:

- A personal introduction
- The initial meeting, what to expect
- Testimonials from clients/referral sources

My advice would be to get direction and help from the people who make their living producing short video pieces for small businesses like yours. Keep the videos short – 2-3 minutes is a good rule of thumb.

In sum, video’s a communication tool well within your reach. It’s a real option. You can do it. It doesn’t have to cost an arm and a leg. And for a modest investment, you can add real polish and personality to your brand.

If you need help getting started with video marketing and other social channels, we have programs to help you master the art of [legal marketing](#). Check out our [Practice Development](#) offerings and [events](#) today.

[Relationship Building: A Communication Recipe for Legal Marketing](#)

Posted by [Wendy Witt, JD](#) on May 15, 2015 2:22:00 PM

A successful practice is built on relationships. Strong, personal relationships that last. Those kind of relationships don’t happen overnight, of course. They take time, effort and skilled communication.

I’d like to share with you my recipe for creating effective communication as part of your legal marketing strategy, a multi-layered approach that will help foster and promote lasting client relationships.

Communication Layer 1 (Close, Personal). The foundational layer should always be individual and personal. Take the time necessary to know your clients well. A welcome note to a new client should be a personal communication – a handwritten note thanking them for the opportunity. Keep a running client calendar for birthdays/anniversaries and send a personal note each year. Other information (important milestones – children’s graduations, weddings, a move to a new home, etc.) calls for a more watchful eye. I recommend subscribing to and following the community or suburban newspaper. That’s where the small, local success stories appear.

Communication Layer 2 (Friendly, Inviting). Here the communication broadens a bit, but keeps a friendly tone. When it comes to holiday cards to clients, I recommend sending them on “off-holidays” such as Thanksgiving or Valentine’s Day. The themes are perfectly suited for a note of appreciation and you’ll stand out from the crowd when compared to the large

stack of Christmas/Holiday cards your clients will receive.

When hosting a seminar, a book signing or other event, make your clients feel special. Send them a personal, handwritten invitation. Design a trustee-training event around your clients' schedules. (Note: with adult children often in town for a visit, Memorial and Thanksgiving weekends are popular choices.) Finally, a client-appreciation event can be a great way to say thank you. Event possibilities: a wine-tasting, group tickets to a baseball game – perhaps renting a movie theatre for a special screening on a Saturday morning.

Communication Layer 3 (Social, Informative). [Estate planning news](#), [tax tips](#), legal updates, etc. make up the informational layer of your communication plan. These include the broader communiqués – a weekly [blog](#), monthly newsletter and posts to your [Facebook](#), [LinkedIn](#), [Twitter](#), and other social media. (Note: Don't send out unsolicited communication. Be sure your recipients have opted in.)

One Last Ingredient. Like a three-layer cake, your communication plan is just about complete. One final recommended ingredient (think of it as the icing on the cake): Bring your social media component full-circle. Don't just post your own info. Respond and comment on your clients' posts as well. Show you're interested in their lives. Congratulate them on their successes and milestones. After all, the best communication is always a two-way street.

[WealthCounsel](#) has the programs and resources to help you hone your communication plan and legal marketing skills. From our [Legal Marketing Showcase](#), mentoring groups, and our popular [Legal Marketing Quick Start Program](#), and more, you'll be equipped to take your practice to the next level.

[The Effective Legal Marketing Kit: 1-2-3](#)

Posted by [Patrick Carlson, JD, LLM \(Taxation\) | Practice Development Mentor](#), [WealthCounsel](#) on Apr 9, 2015 7:29:00 AM

You've outlined a business plan and defined your target. You've crafted a mission statement, a [vision statement](#) and spent time fine-tuning your "elevator" message. So how do you go about practice building? It's time to begin creating your legal marketing kit, the tools that will help position you for success.

Think of your [marketing kit](#) as a real extension of you. It should be both personal and professional. The kit may serve as the "Hello" before you've ever had the chance to meet face-to-face. Or it may be the "Hope to see you again soon" after your first encounter. In either case, an effective legal marketing kit will provide your prospect with two things of value. First, it sets up the opportunity for a relationship, introducing you and helping the prospect understand what you do and why you care. Second, it serves as a roadmap, showing exactly how you can help them and others who are important in their life.

Whether your targeting [prospective clients](#) or [prospective referral sources](#) in your practice building strategy, a good marketing kit should be able to answer three basic questions: 1) Who are you? (Introduction) 2) What do you have to offer me? (Purpose) 3) How do you do what you do? (Process).

1) Introduction (WHO?) Start with your biography, but make it more than just a list of academic achievements and professional credentials. Include a photo of yourself, of course, but don't stop there. Paint them a picture: What drew you to estate planning? Why are you passionate about the work you do? What other passions and interests occupy your time?

2) Purpose (WHAT?) Share your dream: your mission, your vision and over-arching purpose. Start with the big picture (dream), but then drill down to specific benefits and advantages you offer that are meaningful to them – ex., financial health, security, peace of mind, legacy, client opportunities (for [referral sources](#)), etc. For the marketing kit designed for [referral sources](#), be sure to clearly outline your business plan, your practice areas, a description of your ideal client, etc. This will help the source understand where the joint opportunities may lie and how much collaboration is possible.

3) Process (HOW?) Explain your work approach, especially as it pertains to getting started with a new client. This is where the [estate planning questionnaire](#) form should be included. Is there something in your approach that's a bit special, something about the way you work that your clients really appreciate? Be sure to include that here as well.

Once your marketing materials have been printed, assemble and present them in an attractive package (ex. a well-designed, pocketed folder, branded to your firm). Whatever form you choose, the package should say to the recipient "Open me. You really need to see what's inside."

A thoughtful, well-produced marketing kit can speak volumes. It says to your prospects: "I put a great deal of time and effort into creating this kit. I will put the same level of care and attention into serving you." Take your legal marketing efforts to new levels with our one-of-a-kind practice building tools, resources, coaching, and mentoring programs.

Client Marketing Kits: Top 3 Essential Elements

Posted by patrick.carlson@wealthcounsel.com on Oct 15, 2014 11:37:35 PM

By: Patrick Carlson, JD, LLM

Law Business Mentor

You know why you do what you do. And, you know the protections and transformation you provide. But do your prospects?

Not likely.

A well-designed client marketing kit provides your prospects with two things of value:

- First, the kit provides an opportunity to get to know you so prospects can learn why you care. Knowing why you care goes a long way toward building a relationship and prospects will they start to know, like, and trust you.
- Second, the kit provides a roadmap, showing how you can help them. Your ideal client will say, “Aha! This is the attorney for me.”

Effective Client Marketing Kits: Top 3 Essential Elements

You probably already have your marketing kit bones written, so you're off to a good start.

Be sure to include:

1. An introductory letter, describing why you care (your story/bio) and what you can do for the prospect. (How you help clients.) Examples would include “I help parents keep small family businesses in the family” or “I help Boomers protect their retirement accounts from predators” or “I ensure no child will ever be accidentally disinherited.”
2. A copy of *What You Don't Know Will Hurt Your Family: Estate Planning Deficiencies Checklist*. I'm linking to an example you can use to create your own customized checklist.
3. A coupon for a discount on an estate plan such as \$250 off a trust-based plan or \$150 off a will-based plan. [Here's an example of a coupon](#), you can make your own.

Along with your business card, place these materials in a folder branded to your firm. Pass several along to trusted financial advisors or other referral sources to share with their clients.

What would make your client marketing kit even more effective? Let me know in the comments.

Topics: [Practice Management](#), [Legal Marketing](#)

Christie Finnegan

10/21/2014 12:37:18 PM

We also include our Planning Worksheets and Goal Identification Form in our Client folder as well as the "map" of our planning approach (explains each of our meetings as well as importance of Family Meetings and Funding).

Legal Marketing: It Starts With A Solid Foundation

Posted by [Ross Hanchuck | Senior Practice Development Consultant](#) on May 8, 2015
3:41:56 PM

You're working hard to establish your practice, to build a real presence in your community and you're ready to add some effective marketing to help you reach your goals. But before you begin, let me recommend a few worthwhile steps to take on the front end, steps that will help assure success on the back end.

Its important to start with a strong legal marketing foundation, a solid infrastructure that will support your marketing efforts. This infrastructure should be aligned with your firm's goals & values. Now your business will project an authentic message and attract the type of referral sources and/or clients you are looking to work with.

Here are a few of the most critical and often overlooked elements of a successful marketing foundation: Biography, Elevator Speech, Ideal Client and Mission Statement.

Biography. Your [biography](#) will appear in a number of your [marketing materials](#) – website, direct mail, event brochure, etc. More than just educational background and a list of achievements, your biography should tell the reader a personal story – what drew you to a career in [estate planning](#), what do you enjoy most about your business, what other activities you're involved in, etc.

Elevator Speech. “So what kind of work do you do?” It’s a question we’re all asked at least a few times a week. Do you have a concise, compelling answer? A good elevator speech can present you in a positive light to prospective clients and potential referral sources. (Note: Prepare two versions, a client version and a referral source version.) This 30-second message tells the person what you do, who you do it for and how they benefit. I can’t tell you how many times I have received feedback from attorneys who had just written their elevator speech and were surprised how quickly they found it a useful tool in their everyday business life.

Ideal Client. Who is the client you feel you can best serve, the client whose specific needs match well with your special skills and experience? Describe him or her. By clearly defining your ideal client, the sharper your focus will be in marketing to that individual.

Mission Statement. One of the most neglected aspects of marketing planning, your mission statement identifies the target you’re seeking to serve and crystallizes your business purpose. More than just summarizing what you do, a mission statement lets people know why you do it. Just like your biography, a mission statement “Storybook” creates trustworthiness and a sense of connection between you and the prospective client and/or referral source. Using your mission statement as a prominent, active tool on your website and in your marketing activities confidently sets expectations on how you and your firm will be evaluated as a trusted advisor [Download our Mission Statement worksheet](#), and get started on your Storybook.

[Story Time: Create a Successful Biography & Optimize Practice Building](#)

Posted by [Ross Hanchuck | Senior Practice Development Consultant](#) on Apr 16, 2015
2:05:00 PM

In a recent study on how law firms use their websites in [marketing their business](#), LexisNexis Martindale-Hubbell found that the most popular page on a firm's site is the biography page. It's a fact: [85% of site visitors will spend time reviewing an attorney's bio](#). Clearly, the biography plays a critical role in your legal marketing program. And a thoughtful, well-written biography can be a real marketing asset.

What does a well-written [estate planning attorney's biography](#) look like? Well, it doesn't look like a resume, a CV, or a list of bulleted achievements. For many areas of legal practice, a bio that simply covers education, licensure and professional accomplishments may be suitable and quite enough.

For the estate planning attorney, however, the bio needs to say more.

Clients are typically sharing with you more than just financials. It may well include sensitive, personal details concerning health matters, family issues, their hopes, fears, etc. That makes the relationship closer, more personal than many client/attorney relationships. In addition to attorney, your role may often be one of a counselor, a confidante, a trusted advisor. With this in mind, your biography needs to reflect and communicate that very personal dimension of your work and what you have to offer. For you, a successful biography is much more about telling a story than listing facts.

Some [bio questions](#) worth asking and answering include:

- What inspired you to pursue a career in [estate planning](#)?
- What excites you about each day?
- How do you guide your clients from the need to a solution?

You'll be amazed at what a difference a well-written biography can make. Case in point: I recently worked with a [WealthCounsel member](#), helping him to create a fresh, updated biography. A few weeks after posting the new bio on his website the member was contacted by a [financial advisor](#). The advisor told him someone had mentioned the member's name at a business event, so he went to the [attorney's website](#) to research him more carefully. Impressed by what he read in the biography, the advisor felt confident that this was the kind of estate planning attorney his clients would appreciate and want to work with. He was calling to arrange a meeting to discuss referral business and possible seminar partnering opportunities.

[WealthCounsel](#) provides a variety of practice building resources and support to help you create a [solid legal marketing program](#) for your business. This includes a [bio development worksheet](#) to help you craft a biography that tells your story well and connects with your ideal client. If you've got a story worth telling – and of course, you do – WealthCounsel can help.

[Setting & Achieving Your Legal Marketing Goals: From Vision to Action](#)

Posted by [Patrick Carlson, JD, LLM \(Taxation\) | Practice Development Mentor, WealthCounsel](#) on Aug 17, 2015 3:04:32 PM

You've mapped out an ambitious, yet attainable plan for your business and know precisely where you want to be in the next year. Now the question is "What should I be doing this afternoon to get there?"

Actions, we know, speak louder than words. While it's valuable, of course, to consider the big picture, when it comes to marketing our business and reaching our goals, the question we continually face is how to translate thoughtful planning into successful execution?

[Start by building back your plan.](#) That means breaking down that one-year goal into bite-size chunks: quarterly goals, then monthly, weekly and daily goals. For example, if you've set a revenue goal of \$300K for 2015, a reasonable quarterly goal would be \$75K, or \$6K per week (50 weeks/year). That could translate into the weekly goal of two clients per week, each with an average fee of \$3K. With your financial goal now broken down into immediate, intermediate and long-term goals, write out a work plan with activities to ensure you're consistently moving forward and working toward that goal. Activities would include [meeting one new advisor each week](#), adding a new entry to your blog each month, building two referral relationships each quarter, etc.

Manage your time – or it most certainly will manage you. Integrate [legal marketing activities](#) into your practice management software. I recommend using the appointment method to accomplish tasks. Treat your appointment calendar as an appointment/activity calendar. Along with your appointments, make a note of every marketing activity – with a date, a time and a description – and treat each activity with the importance of a client appointment. "Eat the frog," meaning do the most important and most menacing tasks first. Take a few minutes before beginning each task to outline what you expect to accomplish. Like client appointments, activities will sometimes have to be postponed and rescheduled. But don't let what's important be at the mercy of what's irrelevant.

Be accountable for your results. With this in mind, I recommend you share your goal and your [marketing plan](#) with a trusted friend, a mentor, or business associate who knows you, understands your business and will give you a fair, candid critique of your progress.

You've built back your long-term goal into bite-sized chunks; you're managing your time well and staying accountable. Final word of advice: Stick with it. Perseverance is a valuable asset in any enterprise, but especially in the pursuit of a long-term goal. You'll find that by making each day count the weeks, months – and years – will as well.

I'd love to hear your thoughts on how to set and achieve marketing goals? Is this practical? Is it a concern for you? What is working for you? Please share your experiences and tips and tricks in the comments section. If you need help in this area, please explore our [Practice Development resources](#), including coaching, mentoring, webinars, and a vast Knowledge Base.

[Leveraging Your Expertise for Business Growth: Four Steps](#)

Posted by [Wendy Witt, JD](#) on Mar 16, 2015 10:03:13 AM

When it comes to advancing your [estate planning](#) business, one of the best marketing tools you have is right there in the mirror: You. Your knowledge, insight and expertise can be a real marketing asset. But first you have to position yourself as that expert, the reliable source that the media and others turn to for a thoughtful, professional perspective.

With this in mind, here are four steps you can take to position yourself in your community as an estate planning expert and grow your business: 1) Say it! - "I'm an Expert," 2) Publish, 3) Speak/Teach and 4) Become a media source.

#1 – "I'm an Expert." Sounds easy? Perhaps too easy? It's not, actually. There are professional standards (licensure, certification) that apply to the designation of "expert" in our field. State certification in trust and estate planning is one important requirement. National certification through the NAEPC is a valuable next step. But even if you haven't completed the "expert" certification hurdles, you can still highlight your strengths through your website and other means with a "business focus" message. (Ex., "I have focused my business in the following key areas ...")

#2 – [Thought leaders](#) publish. Often. And these days it's never been easier to do. I would recommend starting small. [Create your own blog](#) and connect it to your website. You can also submit articles to professional journals, both traditional and online. For starters, why not submit to our WCI Quarterly? And for local awareness and recognition, write a column for your daily paper, or perhaps a letter to the editor. Note: Each time you are published, be sure to cross-reference the publication where your writing has appeared on your website. ("As featured in ...")

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[Practice Building: Communicate Your Value To Referral Sources](#)

Posted by [Ross Hanchuck | Senior Practice Development Consultant](#) on Jun 22, 2015
2:31:04 PM

In an earlier [blog](#), I reviewed the advantages of a strong referral network (CPAs, financial advisors, etc.) and how to make the most of this valuable resource for effective legal [practice building](#).

In this post, I'd like to "reverse field" for a moment and share some thoughts on how a partnership with you can add real value to a referral resource's business.

When seeking new [referral source](#) relationships, the question of reciprocity is a common one: "Will you, in turn, refer clients to me?" It's a fair question and deserves a fair response. Because many of the clients an [Estate Planning Attorney](#) receives, already have a relationship with a Financial Advisor or CPA, it is very difficult for the attorney to reciprocate referrals. However, the question the referral source is really asking is: "What's the advantage to my business?" Or simply put, "What's in it for me?" To that basic question, your response can be "Quite a bit, actually." Let's review a few of the benefits you bring to the table.

A partnership with you can expand the Advisor's "Circle of Influence" with their clients. An expanded Circle of Influence leads to enhanced client trust. Trust is a valuable commodity. Clients who trust their Financial Advisors entrust more business with their advisors and are more inclined to refer their family, friends or associates to that advisor.

A relationship with you may generate additional [Assets Under Management \(AUM\)](#) for the Advisor. Through your [estate planning](#) process, you may well uncover unmanaged or under-managed assets. Additional product placement opportunities may arise through the estate planning process, as well. And when legal issues arise, the Advisor now has a legal resource to turn to for guidance and, when necessary, you can assist referrals to attorneys in other practice areas (Tax, Divorce, Real Estate, etc.).

To ensure a successful partnership with your referral network, an open, collaborative approach is key. Be sure the Advisor understands that he or she is the lead (or Quarterback) and you are there to offer estate planning support. Early in the relationship, make it clear to the advisor that you prefer the Initial Client Meetings are conducted at the Advisor's office. This will not only make the client feel more comfortable and receptive, it will also keep the Advisor included in the process, thus reinforcing the collaborative-based model you're working to establish.

Take the time to educate your [referral network](#) on the full spectrum of estate planning issues ([Asset Protection Planning](#), [IRA trusts](#), [Special Needs Planning](#), etc.). Teaching your referral sources to "issue spot" will make them more profitable referral partners. Keep them informed on any changes in the law or court decisions. (Last year's [Clark v. Rameker](#) was a good example of a decision that affected IRA planning and, in turn, impacted Financial Advisors and their clients.) Finally, be a source of seminar content. As a guest speaker, you'll be enhancing your collaborative relationship with the advisor and at the same time creating the opportunity for new clients of your own.

A successful, collaborative partnership – it works. For you, for your referral source and, last but not least, for your client. Learn more about how WealthCounsel's Practice Development

resources to help you create valuable referral relationships and accelerate your legal marketing efforts.

[Train Your Referral Sources on How to Properly Send You Referrals](#)

Posted by [Ross Hanchuck | Senior Practice Development Consultant](#) on Mar 26, 2015
12:24:37 PM

We all recognize the value of referral sources and the role they play in helping to advance an [estate planning professional](#)'s legal marketing efforts and business. All referral sources, however, are not created equal. While one may readily refer, another may be detached or disengaged. If you've invested the time and energy in building your network but are less than satisfied with the results, here are some practical steps you can take to improve your referral quotient.

First, it's important to remember that a successful referral network is not a once-and-done project. Like all relationships, these need to be developed and continually nurtured. That starts with educating your referral sources on precisely what you have to offer. Do you have a [Marketing Kit](#) that will help to introduce you and spell out in some detail your practice areas and your planning process? Once the introduction and initial meeting have taken place, you can begin developing your working relationship.

At the top of the development list is educating your referral sources on how to properly make a referral, one that offers a reasonable assurance of success. Train your sources to actively schedule the initial meeting with the client. If a client is meeting with the Advisor and expresses interest in meeting with an [estate planner](#), encourage them to schedule the meeting right then, to strike while the iron is hot. Successful estate planning professionals set aside specific days and hours in their week for precisely these kinds of opportunistic initial meetings.

Further, offer to schedule the initial meeting at the Advisor's office rather than your own. A familiar environment for the client is a more comfortable setting to make your first impression. As an added benefit, it keeps the referral source involved in the planning process, increasing their circle of influence with the client.

A high-tech scheduling tip: Consider installing a scheduling widget on your website and link it to your calendar. Then train your referral source to visit your website, click on the calendar and schedule the meeting immediately. Electronic scheduling increases the likelihood that the meeting can be scheduled while the client is still on the phone or in the Advisor's office – and it avoids the potential problem of a busy or unanswered phone call to your office.

Other important considerations in stoking your network: Upload your [Client Marketing Kit materials](#) to your website. Once a meeting is scheduled, the referral source and/or the client can visit your site and download the [estate planning questionnaire](#) form and any other pertinent information.

Whatever system you employ, keep the lines of communication open and regular between

you and your referral sources. Each time you meet, be sure they understand your process and how it benefits the client and them. Your referral network is a valuable asset. Actively managing and nurturing this asset will help you optimize your practice building efforts, increase your referrals, and reach your goals.

[Learn more](#) about how WealthCounsel can help you hone your legal marketing and practice building efforts.

Leveraging Your Expertise for Business Growth: Four Steps

Posted by [Wendy Witt, JD](#) on Mar 16, 2015 10:03:13 AM

When it comes to advancing your [estate planning](#) business, one of the best marketing tools you have is right there in the mirror: You. Your knowledge, insight and expertise can be a real marketing asset. But first you have to position yourself as that expert, the reliable source that the media and others turn to for a thoughtful, professional perspective.

With this in mind, here are four steps you can take to position yourself in your community as an estate planning expert and grow your business: 1) Say it! - "I'm an Expert," 2) Publish, 3) Speak/Teach and 4) Become a media source.

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[Legal Marketing & the Media: Become a Media Expert](#)

Posted by [Kat Buxton, Communications Strategy Group](#) on Jun 15, 2015 11:45:07 AM

Want to get your name in front of more prospective clients – for free? It's not fantasy; it's public relations.

Attorneys who take the time to properly promote themselves to members of the media can reap huge benefits. Effective [media relations](#) can get you featured in news stories, helping you build your reputation as a legal expert, raise awareness about estate planning topics and educate prospects about the steps they need to take.

So how do you do it? These tips can help.

Add Value: Think about what you can bring to members of the media that other people can't. As an estate planning professional, you can likely provide insight and expertise on related Supreme Court rulings, tax changes or other newsworthy events. If there's a movie coming out that addresses elder law issues and that's part of your practice, you could provide tips for consumers on overlooked legal issues for seniors. Think about topics that are controversial, unique, trendy or timely. How can you provide insight on any of those topics that would benefit a news outlet's audience?

Reach Out: There are several ways you can begin reaching out to members of the media.

1. **Target a specific reporter.** Is there a reporter in your town who covers legal issues for the newspaper or a TV station? Introduce yourself to that reporter and offer some relevant story ideas you can help with.
2. **Send out a [news release or media alert](#).** If your firm is doing something newsworthy, send out a press release to local media announcing the event or news item. When creating the release, be sure to include all the relevant details — who, what, when, where — but also explain why the reporter (and his or her audience) should care about this news.
3. **Be a resource.** Reporters aren't attorneys. They're always on the lookout for legal experts who can provide them with the background information, news tips and analysis they need to write compelling stories. Let reporters and editors know that you're available to help.

Deliver Your Message: Before working with the media, it's a good idea to develop a few [key messages](#). What are your main talking points about this subject? Don't create more than about four – they should fit on one page – and make sure each main point has a few supporting points.

During interviews, focus on those key messages, consistently bringing your answers back to

one of your talking points. Don't ramble. Keep your message concise. Say what you want to say, and then stop. And always be prepared for the worst. If there are difficult questions a reporter might ask you about yourself, your practice or the issue you're discussing, make sure you have a prepared answer to deliver so you're not caught off guard.

If you've ever attended an event after seeing it on the news, or looked up a professional after he or she was quoted in an article, or shopped at a store highlighted in a magazine, then you understand the value of good public relations. With little effort or cost on your end, your [legal marketing](#) strategy could benefit substantially from consistent, favorable media coverage.

Learn more about how WealthCounsel's Practice Development resources can help you accelerate your legal marketing efforts and position yourself as a subject matter expert.

Get personalized guidance

- Coaching and mentoring programs
- Advanced mentoring programs
- Peer groups and accountability groups
- Law office management

“WealthCounsel's Practice Development programs empower you to take the marketing of your practice to the next level no matter at what level you come into the programs.”

Grow your practice

- Legal Marketing Quick Start Program
- Monthly Legal Marketing Showcase webinars
- Group Mentoring Programs and Peer Accountability Groups
- [Legal Marketing Blog](#)
- Seminars
- Live streaming events
- Webinars (live and on-demand)
- Intensive online courses
- Monthly news series

“My practice has increased by 28% since joining. Next week I'm conducting a seminar to 40 real estate agents on how estate planning can benefit them and their clients.”

Brian Ton, JD - Member since 2014

Build your toolkit

- Presentations
- Client communication tools

- White papers
- Blog posts
- Newsletter content
- Research materials
- Practice and office management strategies
- How-Tos and FAQs
- Turnkey presentation packages
- Estate planning brochures
- Practice builder packages

“As a result of this program, I have a marketing packet for referral sources and another for consumers. Over the past 6 months, I’ve met with at least 15 referral sources, established trust and profitable new clients are coming into my office at an increasing pace.”

Jeffrey C. Nickerson, JD - Member since 2013
[View Samples](#)

Legal Marketing & Sales Success: The Importance of Bounce

Posted by [Brett Pinegar | CEO, WealthCounsel](#) on May 29, 2015 7:34:57 AM

There are many ups and downs, difficulties and challenges in [marketing your services](#) to prospective clients. It is easy to let rejection and other obstacles take us out. In challenging times, the key to successful marketing and sales starts with one word – bounce.

No, it’s not fabric softener. And it’s not some soft, fuzzy, “feel-good” concept either. Bounce is a practical tool, a working principle that can help you gain the upper hand and build the business you want, on your terms.

If we live and breathe, we deal with stress – with obstacles, setbacks, challenges. Our resilience, our adaptability in the face of stress is all about bouncing back from hard times and through that process, becoming better and stronger. Bouncing back has two equally important steps: Disintegration, or the sense of things falling apart and reintegration, or the process of building a better outlook or a new way. Here’s how it works.

When we encounter a significant challenge, whether it’s in our work or personal life, it’s not unusual to experience a sense of disintegration or “loss of altitude.” The initial and very human response to this loss or drop is to resist it. We want to keep things as they are, even though the way things are isn’t working very well. We need to overcome our initial fear of change and recognize the call to try something different. We need to replace the fear of change with a fear of what will happen if we do not change. This new fear can motivate us to explore new ways to solve our problems and build a better plan to move forward. With a good plan and productive fear, we are ready to bounce back.

Many of us may be facing a more challenging selling environment where it takes more work to make estate planning relevant. Today, it is less about minimizing estate tax and more about finding family-specific reasons for estate planning. Truth be told, these changes may have made marketing your services a bit tougher. Perhaps that's the “disintegration” you’re experiencing right now.

That experience of loss, of feeling stalled or stuck in our marketing/sales efforts, however, could be the valuable first step toward a stronger, more successful law business. In this example, “losing sales altitude” can push us to readdress some marketing questions: What is my vision for my practice? What are my strengths, shortcomings? In this changing industry environment, who is my ideal client? And how do I best reach and engage them?

Answering these questions may result in a plan to update and expand our referral sources. Or to create a series of seminars and webinars to better reach and connect with prospective clients about helping them build their legacy. Or it could mean a total repositioning campaign, with a whole new set of marketing/sales materials. The key is to maintain our vision – and our willingness - to step back, get creative and do something different.

Many have discovered that the most important qualities we possess to help us grow and advance – persistence, confidence, and resilience – are learned when times are tough. As we replace our fear of change with a fear of what will happen if we don't change, a transformation becomes possible. We will see things more clearly and drive toward something new – a new approach, a new strategy, a new level of commitment – and ultimately reach a better place than where we began. That's a real business advantage. That's bounce.

If you're looking to take your law practice to the next level, we have the practice development resources to help. From useful toolkits to [coaching and mentoring programs](#), you'll learn the legal marketing skills you need to achieve your goals.