

Focus on Attorney's Good Ideas

An activity proposal form allows a law firm to zero in on bright ideas and set marketing priorities.

AS ANY marketing director knows, even the best marketing plan will have some detours along the way. Inevitably, attorneys will develop new ideas — frequently good ones — that need to be worked into the predetermined schedule of activities.

In order to focus these ideas, and to differentiate between the great ones and the ones that can be referred to as "underdevel-

oped," a system was implemented at Minneapolis' O'Connor & Hannan that required the attorneys to articulate their ideas in the form of a written proposal. The proposal form was used for any activity requiring marketing expenditures that were not included in the current marketing plan and budget, and involved such things as specialty brochures or resumes, direct-mail letters seminars or client functions, and sponsorship

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Activity Proposal Forms Focus on Good Ideas

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of or attendance at special events.

The Proposal Form

The proposal form was designed to elicit the following information:

- *Who is the target audience for the activity, and how will the lawyer reach and identify it?* Focusing on this question helps the attorneys understand that targeting the audience ensures optimum results. At the same time, they learn that mailing lists are not readily available for certain desirable groups, or that it can be quite expensive to identify targets.

- *What will the lawyer do, when and where?* Sometimes events are not well-conceived. This activity helps the lawyers figure out the mechanics of their ideas and determine whether there is a timing issue that will affect the project's timetable.

- *What will it cost and who needs to be involved?* Attorneys need to focus not only on the out-of-pocket expenditures, but on the time and effort that will be required by themselves and others (and whether the others will be willing or able to participate).

- *How will the lawyer follow up this activity?* The most important aspect of any marketing effort is follow-up. Getting the lawyers to think about logical ways to stay in touch with this target group is extremely beneficial for

future planning and the likelihood of success.

The Procedure

The procedure was as follows:

(1) Attorneys filled out the forms usually with the assistance of the firm's director of client relations and marketing.

(2) The form was screened by the director for completeness and desirability (i.e., compatibility with the firm's marketing goals and markets, magnitude of the project, necessary expenditures, etc.).

(3) Proposals for those activities deemed to be desirable were forwarded to the management committee for final approval.

(4) If the proposal was submitted by an individual, funds for the approved request were credited to his or her personal promotional account, placing responsibility for the expenditure on the attorney.

(5) The marketing department offered assistance in the implementation of the activity.

The Benefits

The benefits of the system were many. For one, it helped set priorities. The need for management-committee approval often served as a way to weed out bad ideas. It also helped develop a schedule as the proposal form includes sections on logistics.

Also, the system helped ensure that the marketing director was informed of all the attorneys' plans in the marketing area.

In addition, it helped the lawyers realize what goes into the implementation of an idea (e.g. resources, planning, follow-up activities, etc.).

Another benefit of this system is that it helped the marketing director monitor and oversee the marketing budget, both for the current year— as all expenditures had been approved by the management committee — and for the future, as many of the proposals were for recurring activities (such as buying tables at annual client functions).

Finally, it helped the marketing director with the following year's marketing planning, since some good ideas were put on the burner for future implementation..

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Date: _____

Proposal for Marketing Activity

Please complete and return to _____

1. Attorney(s) or Department proposing activity:

2. Brief description of activity:

3. What are the goals of the activity? (Please be specific)

4. Please answer the following questions:

Targets

- Who is the target market for the activity?
- How will they be identified?
- How many exist?

Activity

- What do you propose to do?
- How will the targets be reached?
- Who else needs to be involved (internal and external)?
- When will it take place? (Is there a particular timing issue?)
- If a function, where will it be held?

Projected Cost

Please itemize the anticipated costs of the activity below:

- What do you plan or foresee for follow-up activities and, if so, what is the likely cost?
- Other Comments: