

# Marketing

## Getting Proactive in Your Marketing Efforts: How to Take the Lead

**SALLY J. SCHMIDT** | If lawyers have a flaw in their marketing approach, it may be this: reacting. In other words, instead of setting out a strategy or seeking opportunities on their own, they often hold back and wait for someone to contact them—and then they respond in ways that fail to maximize the opportunity. There is, as you might guess, a better way.

Frequently lawyers invest time in marketing efforts almost by default. Something happens that requires they act, or someone contacts them with a request to join a board, an offer to give a speech, an invitation to a networking lunch or the like. As a result, they often fail to put their limited time into the best activities. Inevitably questions arise about whether the given lawyer's marketing efforts are a good investment of time or money for the firm.

Most marketing efforts would be both more successful and more efficient if lawyers took the lead and initiated activities instead of merely waiting for them to happen. The following provides several examples to illustrate the difference between these three approaches:



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- Simply reacting to an opportunity
- Capitalizing on the opportunity with better execution
- Taking the lead by analyzing the opportunity and developing creative strategies

### Improving Your Initiatives: Five Examples

*Scenario: A publication invites you to write an article on a particular topic.*

- **Reacting.** You do some research and write the article, meeting your word count and deadline.
- **Capitalizing.** You examine the publication's readership to better understand the audience. Who are they? What positions do they hold? How sophisticated are they? You review some past issues to determine the typical format and tone. You contact the publication's editor and a few clients for ideas on how to make your article more interesting and salient to the audience. You write in an appropriately practical, understandable and useful fashion.

- **Leading.** You think about the best audience for you and your practice. Who has the business you want to obtain? What positions do they hold or what areas of responsibility do they have? Does the publication in question really have the right audience for you? Are they potential clients (such as family-owned businesses, physicians, agribusinesses) or potential referral sources (like accountants, lawyers, valuation experts)? You do some research into what publications serve that audience. If they accept articles from outside authors, you pitch them an idea for an article on something novel, such as an emerging trend or a new way to handle an old issue.

*Scenario: A lateral partner joins your firm with an impressive background and range of experience that some of your clients will find useful.*

- **Reacting.** You make sure the firm's announcement of the hiring goes to clients and contacts you have on the master mailing list or in the firm database.
- **Capitalizing.** You send a personal letter to selected targets alerting them to the new partner's capabilities and background.
- **Leading.** Recognizing that the window of opportunity is small, you immediately take the new partner to lunch to talk about his practice and learn what he can do to help your clients. You

develop a target list of clients and referral sources who would benefit from knowing this new lawyer and set up face-to-face meetings to make introductions. You encourage the new lawyer to follow up with your contacts (say, by sending substantive alerts to them) to stay on their radar screens.

*Scenario: You practice in the energy field and subscribe to an industry publication to stay abreast of the issues.*

■ **Reacting.** You read an intriguing article about developments in the field of alternative energy and think about its effects on your practice.

■ **Capitalizing.** You forward the article to some people in the industry with a personal note that you believe they will find it of interest.

■ **Leading.** You think about how the developments described in the article will affect companies in the industry from a legal standpoint, and you create an innovative way to approach the issue. You prepare a client alert or white paper to advise selected contacts about the developments and potential impacts. You reach out to clients to suggest a meeting to discuss your ideas. You also contact an energy industry association to suggest a panel or presentation to its members on the subject, sending along your written material for backup.

*Scenario: An accountant who's a potential source of referrals invites you to lunch.*

■ **Reacting.** You accept her invitation and go to lunch.

■ **Capitalizing.** You establish an objective for the time you will spend together, so you have a business pur-

pose for the meeting, such as learning more about her practice and clients or discussing something you've handled in her area recently.

■ **Leading.** You research the accountant and her firm. You Google her, visit her firm's Web site, talk to other lawyers in your firm and check your firm's database to uncover any other relationships at her firm, and search your firm's intake records for past referrals. Based on what you learn, you generate a list of questions you will ask to better understand how you and she can help each other. You set your objective for the meeting, and after the lunch you follow up with something apropos to your discussion (perhaps an article, a copy of an invitation or a name of a contact). In addition, you tickle your calendar to follow up with her about getting together again. You think of ways you can add value to the relationship, such as introducing her to a colleague, suggesting a joint marketing initiative, coauthoring an article or sending a referral to her.

*Scenario: Someone suggests that you become a member of a particular professional organization.*

■ **Reacting.** You join the organization and attend meetings when your schedule allows.

■ **Capitalizing.** You attend meetings regularly and start to build relationships. You look for ways to be active in the group, by joining a committee or finding a leadership role. You seek opportunities to make your firm more visible in the organization through sponsorships, exhibits or speaking engagements.

■ **Leading.** You think about what really

interests and excites you. Where would you like to make a contribution? You also think about the kinds of people with whom you would like to network. Are they other lawyers? Mortgage bankers? Community leaders? You then research potential organizations in which you might get involved, and you examine their goals, their structure, their membership composition, opportunities for interaction and so forth. You identify organizations with a mission that you support completely, so you will look forward to attending meetings. And then you get involved.

### Increasing the Return on Your Efforts

Compared to reacting or capitalizing, being more proactive and leading your marketing efforts takes more time. It clearly requires more up-front effort to research, investigate and brainstorm opportunities. But you should look at this as an investment in your professional life—if you make certain you're engaging in the right activity and doing it well, the potential for a return will multiply.

If you're not ready to take the lead, at least try to step up your efforts to better capitalize on each opportunity with which you're presented. From there, you can work toward a more planned, and likely more successful, personal marketing effort by: (1) defining your target audiences; (2) researching your opportunities; (3) initiating ideas and activities; and, of course, (4) following through. With enough time and practice, you may even find that the leading process begins to feel natural and enjoyable, too. LP