

Play to Win

## Marketing with a Purpose: Set Objectives

By [Sally J. Schmidt](#) | Mar.27.17 | [Business Development](#), [Daily Dispatch](#), [Legal Marketing](#), [Play to Win](#)



I recall a lawyer friend of mine telling me with excitement that he had been successful in setting up lunch with an assistant general counsel of a target company. Afterward, when I asked what he had accomplished, he said, “We had lunch.” My next question was, “What did you *hope* to accomplish?”

Sometimes lawyers get so caught up in “touches” that they forget each touch needs a purpose. They get so excited about speaking or writing opportunities that they forget each activity needs a strategy.

Here is one simple thing that will make your marketing and business development efforts much more effective: Set objectives for everything you do.

### Everything Needs a Purpose

There are many possible objectives for every activity you undertake. Just to illustrate, here are outlines of various scenarios along with some things you might want to accomplish.

#### Having lunch with an accountant:

- Explain the kinds of clients with whom you work and how you help them.
- Explore mutual opportunities to refer business.
- Pass along a substantive legal update that might affect the accounting firm’s clients.

#### Going to a networking event:

- Reconnect with someone you met at the last event.
- Talk to (or sit with) a specific target.
- Meet two new people.

#### Attending a firm retreat:

- Sit next to people you don’t work with every day.
- Meet someone from another practice area where you have no strong relationships.
- Talk to a partner about a client team you’d like to join.

### **Writing an alert:**

- Position yourself as a subject-matter expert.
- Educate your clients on something that affects them.
- Generate inquiries from prospective clients or referral sources.

### **Meeting with a client:**

- Get feedback on a recent matter you handled.
- Express appreciation for the client's business.
- Ask for additional opportunities.

### **Attending an industry conference:**

- Meet other professionals and vendors that work in the same space.
- Learn more about the organization and opportunities for future involvement.
- Attend a target's presentation.

### **Visiting another firm office:**

- Position yourself as the go-to person in your office for clients needing local assistance.
- Present a "lunch-and-learn" to position yourself as the go-to person for a specific area of expertise.
- Meet other lawyers in the same or complementary practices.

### **Objectives Should Inform Execution**

Establishing an objective should influence how you prepare and execute the activity. For example, if your objective in writing an alert is to generate inquiries, the alert must be extremely timely, contain very practical advice, create a sense of urgency and include a call to action. If your objective in attending an industry conference is to identify opportunities for future involvement, it may make sense to study the committee structure and set up meetings in advance with the chairs of the committees that pique your interest.

The next time you have a marketing or business development opportunity, write down two or three objectives you hope to accomplish. I know it sounds simple but, if you spend a little more time thinking about why you're doing what you're doing, your investment will be more likely to produce a return.

**Sally J. Schmidt** is President of [Schmidt Marketing, Inc.](#), which offers marketing services to law firms. Sally was a founder and the first President of the Legal Marketing Association. She is a Fellow of the College of Law Practice Management and was one of the first inductees into the LMA's Hall of Fame. She is the author of "[Marketing the Law Firm: Business Development Techniques](#)" and "[Business Development for Lawyers: Strategies for Getting and Keeping Clients](#)." Sally writes Attorney at Work's "Play to Win" column. Follow her on Twitter [@SallySchmidt](#).