

Play to Win

[Tips for Creating Some Marketing Discipline](#)

By [Sally J. Schmidt](#) | May.28.15 | [Business Development](#), [Daily Dispatch](#), [Legal Marketing](#), [Play to Win](#)



When coaching attorneys, I ask them to identify their biggest marketing and business development challenges. Their issues run the gamut from not enjoying cocktail parties to recently having relocated.

Some of the issues they name are legitimate obstacles that need to be overcome. However, in many instances, the problems I hear are things like these:

- A lack of follow-up
- Not having enough time
- Not having a plan and sticking to it
- Inertia
- Too many balls in the air

In my mind, these issues relate to focus and discipline, and they can be remedied. Will being better organized make a difference? In short, yes, because much of your business development success hinges on building relationships with the right people, being strategic about your activities, and being persistent and visible.

For example, we know that clients and referral sources are most likely to refer business to people they have heard from or seen in the prior three months. Creating a method to systematically stay in touch with contacts will help you increase your odds of being top of mind.

Tips for Organization and Discipline

Maybe you can't or won't be a "natural" marketer, but anyone can be organized. I have listed a variety of tips below, which may be more or less effective given your situation. I'm not suggesting you embrace them all, but adopting a few will help you create more marketing discipline.

1. Create a list of contacts. Put them in priority order, or organize them into buckets, for example, A = Bimonthly contact; B = Semiannual contact; C = Annual contact (e.g., holiday card). Update your list each year.

2. Create and work an annual marketing/business development plan. Divide it into two sections: (a) Things you will do to build your reputation (such as writing, speaking, organizational activities); and (b) People you will see, how often and why. Use this process to assess the value of what you are already doing. Do your activities target the “right” people? Will they lead to opportunities to develop relationships?

3. Schedule marketing appointments with yourself. Calendar a few hours a week for marketing administrative activities, like sending thank-you notes, setting up lunches or connecting with people on LinkedIn.

4. Break big marketing projects into smaller, more manageable tasks. For example, if you are writing an article, have a one-week deadline to create an outline; the second week could be the deadline for the first section draft; etc.

5. Set up alerts on clients and prospects (e.g., case filings or Google Alerts). These will automatically send you information about your targets, which you can use as a reason to contact them.

6. Establish an objective for your business development and marketing time (e.g., 200 hours a year), and record this time as you do your billable time. As David Maister once said, “People are too busy overinvesting in making today look good (this month’s billable hours) and underinvesting in building a better tomorrow (their own ‘get better’ strategies).” While time isn’t the only factor that leads to success, you do need to make a certain investment in order to see a return.

7. Use technology tools. You can create a contact management system through LinkedIn or Outlook, both of which allow you to keep private notes on your contacts and schedule reminders. Similarly, other tools, like [IFTTT \(If This, Then That\)](#) will automate some of your marketing tasks; for example, if you write a blog post, IFTTT can automatically post it on LinkedIn.

8. Track your activities and results. Put notes in Outlook, set up a chart, or keep files on people you saw and what you discussed. Maintain a spreadsheet of attendees from seminars or webinars at which you presented. Look for follow-up opportunities.

9. Take advantage of your firm’s resources. Be sure your contacts are signed up to receive appropriate alerts, seminar invitations and webinar announcements. Request firm tickets to ballgames or concerts. These kinds of tools and activities give you ways to stay in touch and allow you to add value to relationships.

Frequently, lawyers will look at rainmakers and say, “She’s a natural” or “I can’t be like him.” But there are fewer “naturals” than you might think. I have seen lawyers representing all personality types, practices and geographic locales become very good business developers. Many rainmakers are successful because they manage their marketing efforts well.

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](#).