

## —SCHMIDT ON MARKETING—

# Finding Ways To Follow Up

By SALLY J. SCHMIDT

A LAW FIRM HOLDS a seminar for clients and prospective clients, which is judged by all involved to be a grand success. Over 50 individuals attend the function, including 10 people whom the lawyers feel are good prospects for the firm's services. Six months later, not one attorney has followed up with a single potential client. Sound familiar?

Follow-up is perhaps the most important ingredient in developing new business. Yet lawyers universally seem to have difficulty doing it.

Why is it so hard to follow up?

First, many attorneys have a short-term mentality when it comes to marketing, and expect immediate results. If they hold a seminar or entertain a prospect, they assume an engagement will result.

Second, marketing plans usually are not in writing, so months, or even years, can go by without so much as a follow-up phone call.

Finally, few firms or individual lawyers have established systems for tracking their contacts with clients or prospects. This makes it easy to forget how long it has been since the initial contact was made.

In many areas of law, such as litigation, it is impossible to know when a client will need legal services, so follow-up becomes even more important. A corporate lawyer, who represented the owner of a closely held family business, had mentioned occasionally to this key client that he really ought to have an estate plan. But it wasn't until the businessman nearly had a serious automobile accident that he decided to pick up the phone and take care of it. Unfortunately, he called the lawyer who had made the most recent contact with him, an estate planning lawyer from a competing firm in town.

While following up may be difficult, it plays a critical role in developing new business, for several reasons.

First, in selling there is something called "The Rule of Five." In short, this states that 80 percent of sales are made after the fifth sales call yet 80 percent of all salespeople fail to make five calls.

Second, marketing is a long-term proposition. Developing a new client or a new service can take five years . . . or longer. It is crucial to have an ongoing program of follow up.

Finally, much new business is the result of a cumulative effect — seeing a lawyer in action and developing a relationship over several years' time. This

have to be a telephone call. Examples of activities which allow for follow-up with clients or prospects include: writing an article; making a speech; holding a seminar; circulating copies of articles, speeches and seminar materials; mailing newsletters; circulating brochures; holding annual events, like open houses or golf outings; entertaining; submitting

asking them to complete a short form, such as that shown below, before their budget is approved.

Third, individuals and firms as a whole should continually track and record contacts and their interests. Names of prospects or referral sources can be added to the mailing list on a continual basis.

Fourth, having plans in writing — for individuals and for the firm or department — will help ensure that people don't fall through the cracks. Some law firms have begun to create "Marketing Action Plans" for key clients and top prospects, outlining the activities to be undertaken over a year's time. These plans include specific time frames and designate the responsible lawyers.

Finally, lawyers should be encouraged to share ideas for and be creative in following up. One firm took some time at a marketing retreat to have its lawyers discuss ways they remember to stay in touch with important contacts. These included using the docket system, "ticking" their calendars and creating follow-up lists.

Along the same lines, it is important for lawyers to circulate information about their activities, which others can use in their own marketing efforts. For example, if a lawyer writes an article for a business publication and circulates it to his colleagues, the other lawyers can send it to their contacts and clients with a simple "For Your Information" note. Some firms have FYI cards printed up for the lawyers' use; other buy commercially-available notecards. The format is not as important as the concept: Make it easy for the lawyers to follow up.

*FOLLOWING UP continued on 37*

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## 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 this activity? (Please be specific):
- (4) Targets:
  - (a) Who is the target market for the activity:
  - (b) How will they be identified?
  - (c) How many exist?
- (5) Activity:
  - (a) What do you propose to do?
  - (b) How will the targets be reached?
  - (c) Who else needs to be involved (internally and externally)?
  - (d) When will it take place? (Is there a particular timing issue?)
  - (e) If a function, where will it be held?
- (6) Please itemize the projected costs of the activity below:
- (7) What do you plan or foresee for follow up activities, and what is the likely cost:
- (8) Other comments:

increases the need for continual visibility and reinforcement.

The first suggestion for following up is to mix communication strategies. In other words, the contact does not always

proposals and sending holiday greetings.

Second, lawyers must be encouraged to think about follow-up opportunities before they undertake any marketing activity. This can be accomplished by