



Play to Win

Planning a Strong 4th Quarter for Your Law Practice

By [Sally J. Schmidt](#)

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I love football. High school, college, pro — it doesn't matter. While football teams need a strong performance for the entire 60 minutes, I know games are often won or lost in the fourth quarter. *You* are in the fourth quarter now. As the clock winds down, here are some end-of-year marketing plays you can use to finish strong and set yourself up for a win next year.

Now is the time to plan your end-of-year marketing activities and put things in place for the New Year. Here are some examples:

1. Get Ready for Your Holiday Outreach

If you send holiday cards or gifts, is your list ready? Prepare a list of the year's top clients or referral sources by revenue to be sure you are recognizing the most important people. Determine which ones will get handwritten cards thanking them for their relationship — you can even write them out now. Decide who will get a gift. Give some thought to appropriate recognition; you still have time to personalize or customize your approach.

2. Talk to Clients About Their Budgets

Most clients are going through their planning and budgeting process now (if they haven't already). Talk to your clients about their key imperatives for next year and how you might help. Assist them in determining numbers to plug into their budgets for big matters or anticipated projects.

3. Create Annual Reviews and Substantive Summaries

Do you create any annual reviews or yearly summaries? Many lawyers prepare things like the "Top 10 Whistleblower Cases of the Year" or "Trends in White-Collar Matters." If you gather information from the first three quarters now, it will be easy to add to the final analysis. It will also help you get your information out to your audiences in a timely fashion.

4. Schedule Holiday Lunches, Parties or Dinners

If you plan to see good clients or referral sources before the end of the year, start to schedule these get-togethers. Calendars fill up quickly with holiday events and year-end activities, so get some commitments now.

5. Plan New Year Client Visits

Most clients are going to be busy in the fourth quarter, so you should plan to meet with as many as possible in the early part of the new year. This is an excellent time to get together for a look back at the year — what you handled, how it went, what could have been done better — and a look forward at the new year — what is coming down the road and how you fit in.

6. Write Next Year's Business Plan

Finally, and very importantly, write your personal business plan for the coming year. (If you have time, do it strategically, identifying your goals, objectives, strategies and activities. If you don't, you can still make your efforts more productive by establishing some objectives for next year (e.g., plan three webinars, write 12 blog posts, visit a client once per quarter) and outlining some specific activities for the first quarter (e.g., "Visit XYZ company to introduce my colleague from the New York office").

Lawyers are busiest at the end of the year. Start your end-of-year marketing [activities](#) now so you don't miss out on fourth-quarter opportunities.

Sally Schmidt, President of Schmidt Marketing, Inc., helps lawyers and law firms grow their practices. She was a founder and the first President of the Legal Marketing Association, is a Fellow of the College of Law Practice Management and was one of the first inductees to LMA's Hall of Fame. Known for her practical advice, she is the author of two books, "[Marketing the Law Firm: Business Development Techniques](#)" and "[Business Development for Lawyers: Strategies for Getting and Keeping Clients](#)." Follow her @SallySchmidt.