



## **Sample Personal Marketing Plan for 2008**

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**Join us in Dallas for the Full-Day Personal Marketing Plan & Action Program Workshop**

**Where You Too Can Prepare a Plan Like This...**

**Why Wait Another Year  
To Get Organized and Build the Know-How  
You Need To Boost  
Your Revenue and Originations?**



***[www.sagelawmarketing.com/bar2008planworkshop](http://www.sagelawmarketing.com/bar2008planworkshop)***

## ► **Developing Your Personal Marketing Strategy: Overview**

The secret to your success is to model yourself on the business development attitude and behavior of the top rainmakers in the legal profession. Simply put, if you take *the same actions* as these top producers on a disciplined, consistent and systematic basis, then you can start to produce *the same results*.

So, your aim in our work together is to focus on the set of actions that drive success for these top producers, tailor their actions to your practice and personal circumstances, and then do it, follow-through on the actions.

### **The Outline of Your Personal Marketing Program**

Your personal marketing strategy will evolve from the following **8** steps. We take you through a thought process to build the best strategy for your specific practice and the marketing actions that will implement it. As you proceed, you should know that the normal inclination of most attorneys is to proceed backwards through these steps, if they do them at all. Rainmakers recognize that prioritizing the effort from the top down yields the best results, the greatest success for the time invested.

- 1. *Market to Your Best Existing Clients:*** The right place to start is to focus on your existing clients. These clients represent your most immediate source of revenue. The best producers find ways to become an indispensable business advisor to their top existing clients. They constantly search for ways to strengthen their personal chemistry with these clients. They look to solve any additional or new sources of potential business trauma they face. In short, the best business generators never let the romance fade in their marriage with their top clients.
- 2. *Focus on Your Ideal Prospective Clients:*** Think about the CLONES of your best current clients—because these identical targets represent the top opportunity for growing your practice. Define these companies/individuals as specifically as possible. Test your description with a few clients or prospects who fit the profile.
- 3. *Define Your Personal Value Proposition for these Ideal Target Clients:*** In legal services, people buy people—not just firms. So, YOU are the “product”. Ultimately, nobody can market and sell your services BUT you. Also, clients care only about their own business “pain”. People buy your services to solve or avoid troubles and trauma. So think like a business “doctor”. Determine why you are a solution for their compelling and urgent points of business pain. Explain and “package” your services in this context.

4. **Turn Your Clients into Your Sales Force:** Your clients should be your best source of referrals. Let them know that you expect and appreciate referrals. Tell them to what type of prospective client you would like to be introduced.
5. **Market Yourself Inside Your Own Firm:** Your best allies in growing your practice may be right across the hall from you. Find ways to market cooperatively with individuals or teams of your colleagues.
6. **Co-Market with High Power Professional Allies:** Invest time cultivating exceptional relationships with a very select team of professional allies outside of your firm. Go to market on a cooperative basis with these allies.
7. **Build Your Network with a Purpose:** Your success will be based on the vitality of your business relationships. You want to add to your network only those who can act as your eyes and ears in the marketplace, who will spread the word of mouth advertising you will need to succeed and who proactively identify ways to help you meet the right potential clients.
8. **Build Your Professional Reputation:** Differentiate yourself by publicizing the personal qualities and work experiences that make you UNIQUE and VALUABLE. Choose advantageously among all the tools at your disposal—speaking, writing articles, direct mail, personal publicity, e-mail marketing, web-site postings, blogs, etc.

These steps turn directly into your plan of action on a weekly and quarterly basis.

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What follows is a **sample plan** from one attorney we worked with.

This handout concludes with one of the ways we start your thinking and progress before the workshop – by helping you **set some goals** for yourself to improve what you have been doing.

## **SAMPLE PLAN FROM ONE ATTORNEY**

### **1) Situation Assessment**

As an experienced lawyer, you are now at a point in your career where you want to take a more proactive and committed thrust into business development.

In all of our work together, you have demonstrated an exceptional business development sense and strong marketing instincts for somebody at this point in your career – demonstrated by the high quality and professional work you have done on your personal marketing strategy.

You have a number of strengths that will make you successful in your entrepreneurial pursuit. Our goal in working together should be to focus on the human resource arena; combine both direct pursuit of target/existing clients with a strategy to leverage your relationship with professional allies; and find teaming opportunities with key partners in the corporate practice group.

### **2) Strengths To Leverage**

- Strong track record and well-earned reputation in the human resource area
- Exceptional marketing and selling instincts
- Extensive professional and personal network of relationships
- Well crafted, clear and focused set of target clients
- Number of high potential alliance possibilities (both internal and external)
- Solid communication and packaging skills
- Eagerness and initiative

### 3) Personal Marketing Strategy And Focus

<u>Segment 1: Construction-Employment</u>	<u>Segment 2: Employment</u>	<u>Segment 3: Media</u>
<p><b>Target:</b> Homebuilders, developers, commercial construction companies, general contractors, and larger subcontractors, both publicly and privately held, based in the Rocky Mountain region with 15 or more employees, independent contractors, and/or commissioned sales people.</p> <p><b>My Value Proposition:</b> Construction defect and delay litigation; construction contract review and counseling; employment disputes.</p>	<p><b>Target:</b> Publicly held and medium-sized or larger private companies -- ideally real estate or construction-related -- that are self-insured for employment practices liability and that have offices or employees spread across the Rocky Mountain region or nationwide.</p> <p><b>My Value Proposition:</b> Employment discrimination litigation; wage disputes; unemployment claims; preventative counseling on terminations, discipline and work-force reductions; drafting employee handbooks; drafting employment and non-competition agreements; enforcement of non-competition agreements and protection of trade secrets.</p>	<p><b>Target:</b> Companies that publish news content or information, including newspapers, magazines, cable networks, and production companies.</p> <p><b>My Value Proposition:</b> Libel and defamation defense; quashing reporter subpoenas, pre-publication review and counseling; Open Records Act and FOIA requests; Open Meetings Act enforcement.</p>

<p><b>Existing Clients in Target:</b></p> <p>Golden Design Group Johnson Homes Commercial Shortbread County Roofing La Roche Constructors Knavely Development Co. Hartshorn/Trail Division Levenworth Development</p> <p><b>Internal Allies:</b></p> <p>Laurin King Paul Rifkin Jim Covert Stu Levenick</p>	<p><b>Existing Clients in Target:</b></p> <p>Cox-Smith Roadway Truck Golden Design Group Mid-West Life &amp; Annuity River Creek Radio Lockport Companies CAMICO</p> <p><b>Internal Allies:</b></p> <p>Fred Morse Jim Nothnagel Kim Lewis Tim Condon Dave Mastio</p>	<p><b>Existing Clients in Target:</b></p> <p>AB Scripps Co. (Rocky Mountain News, Boulder Daily Camera) Colorado Community Newspapers (Parker Chronicle, Elbert County News, Douglas County News)</p> <p><b>Internal Allies:</b></p> <p>Kim Cox Jim Gurke Bob Schleicher</p>
<p><b>Non-Clients in Target:</b></p> <p>Kim Cox Holdings, Inc. CH2M Hill Phelps Construction Co. PCB Construction Enterprises, Inc. Seely Johnson Construction Co. Village Homes of Utah Shawshunck Construction CI Constructors, Inc. Hawk Construction Phipps, Inc. Dracual Industries H&amp;B Architecture MZ Engineers, Inc. Lake Tahoe Development Construction, Inc.</p> <p><b>Professional Allies:</b></p> <p>Peter V. Huston (owner, GDG)</p>	<p><b>Non-Clients in Target:</b></p> <p>MBA Holdings, Inc. ProLogistics Trust AIMCEF Affordable Communities, Inc. Vest Properties, Inc. Illinois Medical Response First Data Corporation. Jensen Crickets Chipotle</p> <p><b>Professional Allies:</b></p> <p>Dave Franklin (HR, Archstone-Smith) Chris Jackson (in-house CH2M Hill, formerly First Data) Michael Landen (in-house, AMR) Scott Cissna (VP finance, Cricket)</p>	<p><b>Non-Clients in Target:</b></p> <p>Cinergy Media Group Fox Publishing</p> <p><b>Professional Allies:</b></p> <p>Christine Maher (publisher, CCN) Chet Woodford Michael Gartner (owner, Big House Media) Lou Dalglish (executive director, Reporters' Committee for Freedom of the Press)</p>

<p><b>Targeted Actions:</b></p> <ul style="list-style-type: none"> <li>• Update bio to reflect target</li> <li>• Join trade group and attend functions to build knowledge of industry and number of contacts in the field</li> <li>• Conduct or participate in seminars for existing clients that counsel on best practices to avoid construction and employment claims</li> <li>• Work closely with Laurin King and other internal allies on pitches or other marketing opportunities</li> <li>• Develop information database about each targeted non-client and keep current on real estate development news</li> </ul>	<p><b>Targeted Actions:</b></p> <ul style="list-style-type: none"> <li>• Update bio to reflect target</li> <li>• Be available to assist in employment litigation for existing clients</li> <li>• Participate in firm-sponsored seminars and receptions targeted toward these businesses</li> <li>• Conduct or participate in firm's employment law breakfast series</li> <li>• Meet more often with contacts to learn more about their companies and their "pains" (includes developing personal board of directors)</li> <li>• Continue participation in Colorado Women's Chamber of Commerce</li> </ul>	<p><b>Targeted Actions:</b></p> <ul style="list-style-type: none"> <li>• Update bio to reflect target</li> <li>• Conduct or participate in seminars for existing clients to prevent libel claims or to protect sources</li> <li>• Join and become active in Denver Press Club and Society of Professional Journalists</li> </ul>
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**4) Organizational Action Plan.** Join Commercial Real Estate Women's Group, to increase contact with potential clients, industry players and referral sources, as well as showcase your professional capabilities

<p><b><i>Organization Name &amp; Membership Profile</i></b></p>	<p>CREW: Senior women in all aspects of commercial real estate development</p>
<p><b><i>Current Clients And Allies Actively Involved</i></b></p>	<ul style="list-style-type: none"> <li>• Golden Design Group</li> <li>• Johnson Homes</li> <li>• Commercial Shortbread</li> <li>• County Roofing</li> <li>• La Roche Constructors</li> </ul>
<p><b><i>Target Clients Who Are Members</i></b></p>	<ul style="list-style-type: none"> <li>• PCB Construction Enterprises, Inc.</li> <li>• Seely Johnson Construction Co.</li> <li>• Village Homes of Utah</li> <li>• Shawshunck Construction</li> <li>• CI Constructors, Inc.</li> </ul>
<p><b><i>How to Become a Visible Leader</i></b></p>	<ul style="list-style-type: none"> <li>• Volunteer to be membership director</li> <li>• Sponsor roundtable in our offices</li> <li>• Invite select members to firm event in May</li> </ul>
<p><b><i>How to Highlight Specific Services</i></b></p>	<ul style="list-style-type: none"> <li>• Write article on latest developments in sexual harassment with construction industry case studies</li> <li>• Speak at the regional conference on the same topic</li> </ul>

## **5) Objectives For 2008**

- Focus first on the human resources area
- Define and “package” a set of human resource focused service offerings
- Direct market these services to the defined set of target clients
- Manage and cultivate my professional network:
  - Establish your personal board of directors
  - Select 1-2 for co-marketing programs
  - Ask select contacts for introductions
- Pilot test ways to broaden your reputation through public speaking and writing within the HR/ construction industry community
- Define a co-marketing thrust with selected internal allies

## **6) Priority For Last Quarter Of 2008**

Suggest three near term priorities:

1. Define/select “hot” HR issues and related BH solutions/case studies relevant to the construction segment and other targets
  - a. Directly promote to existing/target clients
  - b. Define co-marketing plan with select colleagues at BH
2. Select and develop co-marketing plan with external allies
3. Define a through and systematic plan to cultivate your network of professional contacts:
  - a. Prioritize
  - b. Establish personal board of directors
  - c. Immediate contact with “A’s” to ask for introductions
  - d. Game plan for ongoing contact and follow up

## **7) Action Plan**

1. Select 2-3 HR points of “pain” and create:
  - a. Client letter/Prospect letter/e-mail
  - b. Case study
  - c. Service description
2. Circulate #1 in conjunction with list of target clients to colleagues at BH Denver to find any potential introductions
3. Meet with your “A” contacts and ask for introductions
4. Develop a complete marketing campaign with a professional ally around 1 issue
  - a. Direct marketing (mail/e-mail) to both potential clients and referral sources
  - b. Leverage industry/HR association opportunities (speaking; writing)
  - c. Internal BH roundtable
  - d. Consider more innovative approaches (target blogs; web seminar, etc.)

## **8) Support, Training And Coaching**

1. Define and prioritize work plan
2. Provide an approach to organizing and pursuing your personal contacts
3. Help to create end to end set of materials focused on 1-3 HR points of “pain”
4. Provide “hand-on” help in the direct targeting of clients/targets
5. Help you to select and launch a co-marketing approach with an ally
6. Sales coaching on:
  - a. Asking for introductions
7. Develop plan and support a pilot marketing campaign

## ► Setting Your Annual Goals

To start, think about the goals you have for yourself, your practice and your value to your firm. In this section, we take you through a few quantitative and qualitative goal setting questions that will drive the resulting action plan that you develop.

To be effective, your goals have to be SMART – specific, measurable, actionable, realistic and tangible. As you set your goals for 2007, particularly in answering the first 5 questions, refer back to your actual numbers for 2006.

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So, take some thoughtful time and consider the following questions:

- 1) What is your overall revenue goal for 2007? \_\_\_\_\_
- 2) What percent increase is this amount over 2006? \_\_\_\_\_
- 3) Break down your annual revenue goal between:
  - 3.1 Existing clients (%) \_\_\_\_\_
  - 3.2 New clients (%) \_\_\_\_\_
- 4) Break down your annual revenue goal by source  
(Use % figures adding to 100%):
  - 4.1 Add- on or new work sold to clients  
*(repeat answer to 3.1)* \_\_\_\_\_
  - 4.2 Referrals from clients \_\_\_\_\_
  - 4.3 Referrals from other attorneys in my firm \_\_\_\_\_
  - 4.4 Referrals from my network outside the firm \_\_\_\_\_
  - 4.5 Prospects I meet through marketing myself \_\_\_\_\_
  - 4.6 People who find me “out of the blue” \_\_\_\_\_

5) Break down your annual revenue goal by type of work/services:

Description	%
_____	_____
_____	_____
_____	_____
_____	_____

6) What changes will be most important to realizing these goals?  
(Rate each of the following factors on a scale from 5=Essential to 1=Not important.)

\_\_\_\_\_ *6.1 Clearing more time to act on business development daily/weekly.*

What changes do you need to make to achieve this result?

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\_\_\_\_\_ *6.2 Forging stronger relationships with allies inside my firm*

What changes do you need to make to achieve this result?

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\_\_\_\_\_ *6.3 Building co-marketing relationships with allies in related professions*

What changes do you need to make to achieve this result?

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\_\_\_\_\_ *6.4 Increasing the quality of my referral network*

What changes do you need to make to achieve this result?

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\_\_\_\_\_ *6.5 Becoming a visible leader in a client-rich association*

What changes do you need to make to achieve this result?

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\_\_\_\_\_ *6.6 Getting a mentor, coach and personal board of advisors*

What changes do you need to make to achieve this result?

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*7) How will you benefit from achieving these business development goals in 2007 (in terms of your career, personal reputation, control of your own future, etc.)?*

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