

Marketing Plan Worksheet for Lawyers

STEP 1: PROFILE

A: Work You Would Like More Of

Types of Work You Want More Of	Experience in this Work
1.	
2.	

B: Target Markets

Target Markets for Work Type 1	Experience in This Market
1.	
2.	

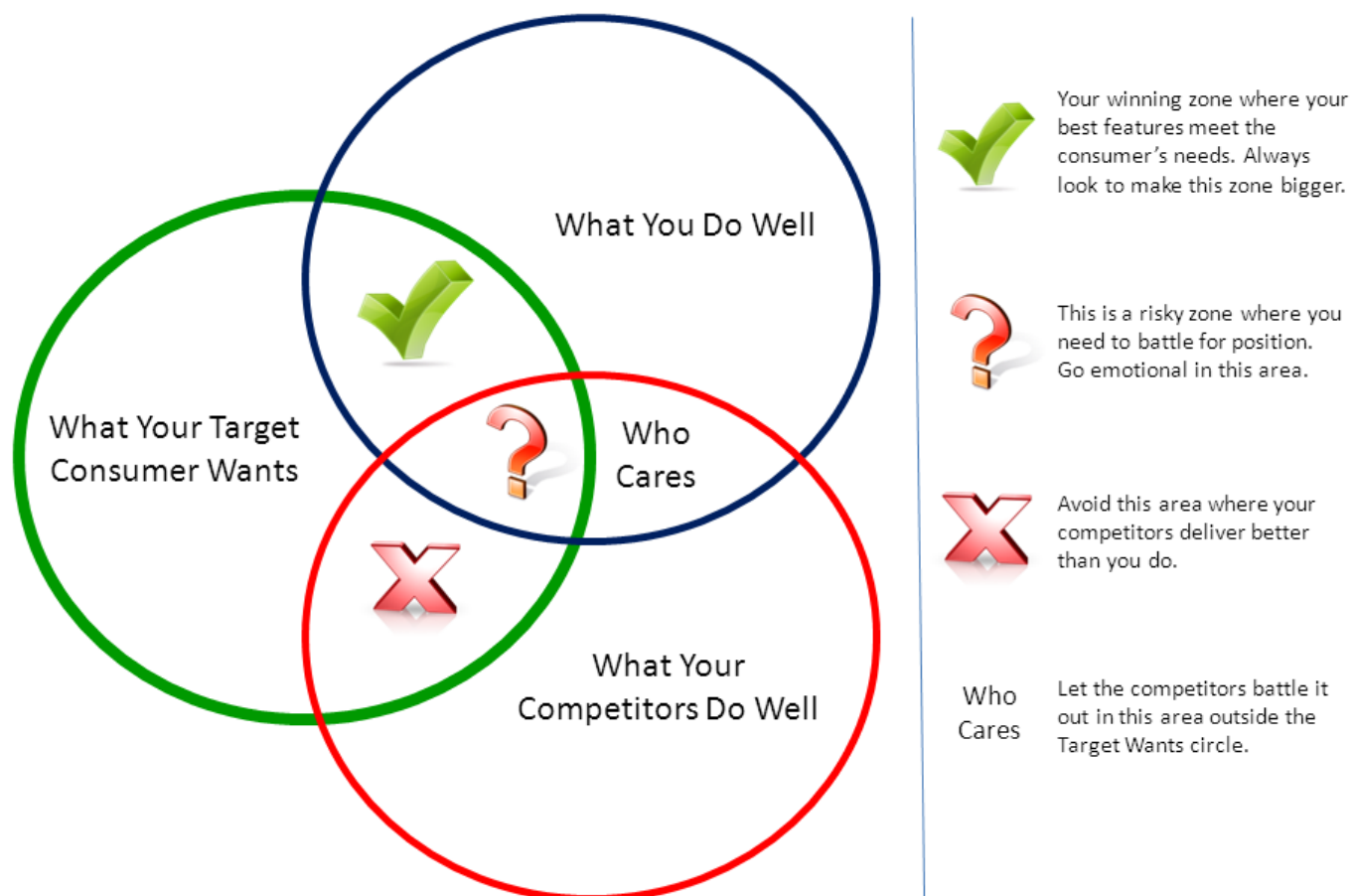
Profile Target Market 1	Description
Expertise Required	
Decision Maker	
Referral Sources and Gatekeepers	

Target Markets for Work Type 2	Experience in This Market
1.	
2.	

Profile Target Market 2	Description
Expertise Required	
Decision Maker	
Referral Sources and Gatekeepers	

C: Your Unique Selling Proposition (USP)

The worksheets on the following pages will identify the intersection of what you do well and what your target wants. Look closely for the emotional benefits as these will make you the winner.



Your Profile

Attributes	Description
The number of Partners & Associates.	
Cases you are very good at.	
Case summary of recent & relevant work.	
What do your clients think of you?	
What do your colleagues think of you?	
Describe your brand as a lawyer.	
Industries you have experience with.	
Rates compared with the competition.	
How often do you publish or post?	
Best success story.	
What do you do better than others?	
What do others do better than you?	

Competitor 1: _____

Attributes	Description
The number of Partners and Associates.	
Largest clients.	
Reputation.	
Primary practice areas.	
Primary industries served.	
Reputation as category authority in...	
Marketing tactics.	
How do they describe their brand?	
What they claim to do better than others.	
What you do better than them.	
Where are they vulnerable?	


Competitor 2: _____

Attributes	Description
The number of Partners and Associates.	
Largest clients.	
Reputation.	
Primary practice areas.	
Primary industries served.	
Reputation as category authority in...	
Marketing tactics.	
How do they describe their brand?	
What they claim to do better than others.	
What you do better than them.	
Where are they vulnerable?	

Consumer Wants and Needs:

Consumer Wants	Descriptions
Experience required.	
Do they hire law firms or lawyers?	
Practice areas required.	
Leadership skills required.	
Types of cases handled.	
Selection process for hiring a lawyer.	
Added-value functions expected?	
Technology requirements.	
Other wants and needs.	

D: Brand Positioning Statement

Consumer Wants	Brand Positioning Statement	What You Do Better vs. Competition
	I make my client's lives easier by...	

STEP 2: REACH

E: Your Consumer Value Proposition (CVP)

Your CVP is the marketing slogan that grabs the attention of your target consumers – it's the overall theme for your marketing campaign. When writing your CVP, pretend that you will "SHOUT IT FROM A MOUNTAIN!" This will force you to keep it short as you cannot shout a long sentence from any mountain.

Lawyer's CVP:

F: Annual Marketing Budget: \$ _____

G: Message Delivery Tactics

- | | | | |
|--|---|---------------------------------------|--|
| <input type="checkbox"/> Print Advertisements | <input type="checkbox"/> Search Engine Optimization | <input type="checkbox"/> E-Blasts | <input type="checkbox"/> Publish Articles |
| <input type="checkbox"/> TV/Radio Advertisements | <input type="checkbox"/> Press Releases | <input type="checkbox"/> Social Media | <input type="checkbox"/> Seminars/Webinars |
| <input type="checkbox"/> Website | <input type="checkbox"/> Blog | <input type="checkbox"/> Newsletter | <input type="checkbox"/> Business/Network Events |
| <input type="checkbox"/> QR Codes | <input type="checkbox"/> Podcast | <input type="checkbox"/> Brochures | <input type="checkbox"/> Event Sponsorships |
| <input type="checkbox"/> Billboards: | <input type="checkbox"/> Other: | <input type="checkbox"/> Other: | <input type="checkbox"/> Other: |

H: Goals for Delivery Tactics

Tactic 1:	Tactic 4:
Tactic 2:	Tactic 5:
Tactic 3:	Tactic 6:

I: Materials Needed

Tactic 1:	<input type="checkbox"/> Have	<input type="checkbox"/> Need	Tactic 4:	<input type="checkbox"/> Have	<input type="checkbox"/> Need
Tactic 2:	<input type="checkbox"/> Have	<input type="checkbox"/> Need	Tactic 5:	<input type="checkbox"/> Have	<input type="checkbox"/> Need
Tactic 3:	<input type="checkbox"/> Have	<input type="checkbox"/> Need	Tactic 6:	<input type="checkbox"/> Have	<input type="checkbox"/> Need

J: First Seven Marketing Touches

First Seven Marketing Touches for Work Type 1	
1.	
2.	
3.	
4.	
5.	
6.	
7.	

First Seven Marketing Touches for Work Type 2	
1.	
2.	
3.	
4.	
5.	
6.	
7.	

K: Implement Your Marketing Plan

STEP 3: Connect

L: People You Need to Connect With

People You Need To Connect With <i>(Name and Company)</i>	
1.	
2.	
3.	
4.	
5.	

M: Your Current Connections

Your Current Connections <i>(Name, Contact Information)</i>	Your Current Connections <i>(Name, Contact Information)</i>
1.	6.
2.	7.
3.	8.
4.	9.
5.	10.

N: Industry and Business Associations

Associations and Groups	Associations and Groups
1.	3.
2.	4.

STEP 4: Engage

O: Why Prospective Clients Need You

Be specific, do not use vague terminology that any lawyer or law firm could state. You will use these reasons to engage your prospects.

You should hire me to handle your legal work because...
1.
2.
3.

STEP 5: Convert

P: Always Be Ready to Close the Deal

Know what you need from the prospective client and be ready to deliver what they need from you.