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*Back row from left: Bill Kamenjarin, Christine Mueller, Jennett Maniscalco, Dawn Cauthen, Wm. Lionel Halsey.
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Efficient Marketing

Marguerite C. Lorenz



Efficient marketing is a challenge for all professionals. Instead of marketing being quicker and easier with the new Social Media technology, it seems it is more difficult than ever to keep up! This article provides an effective approach to using the technology for your benefit.

If you are a sole proprietor attorney (or an attorney who is expected to bring more clients into your firm), taking out an ad in the local paper is no longer enough. If you are just starting out on your own, marketing effectively can be especially tough. “Efficient Marketing” is getting the most out of your effort with the least amount of time and money spent. Even though there is no “automatic” way to get referrals (even with the technology available), there are great ways to use the tools at hand to develop and sustain good relationships.

Advertising is letting others know where to find you. Marketing is the art of teaching others why you are the best choice. I believe that marketing includes advertising, networking, social media, website management, public relations, and deep self-awareness. As a professional trustee and executor, I have been represented by and have worked with many attorneys. You might say I am a “professional client.” My perspective as both a marketer of my own somewhat obscure services and as a client who has experienced many different law offices, I have learned that some marketing techniques are better than others for attorneys.

Is your current advertising program working for you? I don’t believe advertising is enough anymore. I have never hired an attorney from an advertisement in the yellow pages or on the web. Instead, I have selected attorneys to work with based on referrals and on conversations together at networking meetings, then I have gone to the Internet to learn more about the individual attorney. According to Karen Korr, Communications Director for the San Diego County Bar Association, there are approximately 14,000 attorneys currently serving in San Diego County. Add to this, some attorneys I have talked with say that the overall market has slowed down. Some

estate planning attorneys have said that fewer clients are seeking estate plans.

The Efficient Marketing approach is specific to our (legal and financial) mutual professional world rather than product sales. These tips are designed for you to do yourself, to specifically improve your referral pipeline, with just a few hours a month.

A good plan includes all aspects of marketing and includes time/money budgets for these activities. This article is focused on just one aspect of marketing. A great source for creating a detailed marketing plan can be found here: http://www.sba.gov/smallbusiness-planner/manage/marketandprice/SERV_MARKETINGPLANS.html

Social media networking appears to be new, but all of us have received lots of paper “direct mail” (and thrown it away). Emails, tweets, and website home pages, like Yahoo, are a lot like direct mail (without the post office): we skip it or delete it. What is really new are two important aspects how we can use the technology.

One is the opportunity for potential clients to search for the professional they think they need, beyond the phone book, and learn more about the professional before ever calling for an appointment. More and more potential clients are taking advantage of the technology in this way.

Another opportunity you have is to make the information you want your ideal client to learn about you immediately available. This seems obvious, but can be challenging if you don’t know where to put your energy or haven’t given yourself the time to focus attention on this area of your marketing.

Take only three minutes and write a list of what you feel makes you different from the other professionals who offer the same basic services. The more experience you learn from, the more you will have to offer that is unique to you and your interests.

Take 10 minutes to answer these questions: What issues do you know how to solve? What kind of client can you serve best? What cases are the most fun for you? Writing short answers to these questions is worth some time because these very ideas will further

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differentiate you from your competition and keep you going energetically. I am talking about your identification of what makes you passionate about your work.

I depend on the great trusts and estates attorneys I work with. Some lay people may view your work as a commodity (a potential client may say, "I can get any attorney to write up my will or trust...") or only be willing to hire an attorney after the trouble has begun. Professionals such as CPA's and financial advisors may want to refer their clients to you but, unless you explain the benefit of your services, this professional may not know what to say. If you focus on training the other professionals in your life about what you do and what problems you can solve for their clients, they will be more ready to refer you when the client's need presents itself. You know effective marketing is at work when a particular issue arises and you know who to call. To receive those calls because others know what issues to call you about, you need to further develop your message. The next action step might take half an hour...

Without editing, write what you love about your work until you are fully expressed. Once you have expressed what you love, write an explanation of what you do, being clear about any special training you have to do it. Put away today's writing without looking at it until the next day or next time you have scheduled some "marketing" time. I suggest (if you want to grow your practice) that you schedule four hours a week from now on for "marketing." In theory, this is 10% or less of your work time. As an example, if you have followed the above suggestions, you have spent one hour on preparing to receive more of the work you enjoy.

Whether or not you have years of experience or you are just starting out, the following can be helpful in attracting the kind of cases you thrive on. Now, we will look at the writing you did (yesterday?), spend Hour #2, and put it to work for you:

1. There is no "automatic" way to build relationships.

My partner, Jane Lorenz, has been a CPA for over 35 years. One of the most valuable things I have learned from her is that learning what other people are interested in not only makes the work more fulfilling, the exchange of interests deepens relationships. This process

takes time. Meeting people in person, developing warm relationships, and consistent follow-through are the three steps to success no matter what technology you use to get it started.

Let's take a look at your writing. Find the four or five sentences that express your style of communication and your excitement about the work you do. Write a two- or three-sentence description of your "ideal client" (age, assets, special issues you can help with, etc.). Now, we can think about some of the marketing tools available to you.

2. Every marketing tool that works will bring you people to meet in person.

How have clients come to you? Was it a direct referral from another professional? Was it from an ad or a speaking engagement? Was it from your social media networking (LinkedIn, Meetup.com, or Twitter)? Start a list today (Excel is great for this) and note the date, the referral source, and the result. This is how you will know what works and what doesn't work

for YOU. Don't worry about the past; just start the list from today and go forward. It has been my experience that getting to know other professionals has been more valuable than meeting hundreds of potential clients at public speaking or Chamber of Commerce events. This kind of resource management has helped me to be more efficient with my marketing efforts because I understand what works to bring in more of our ideal clients.

3. Social Media Networking is just the beginning.

Are you Tweeting? Are you inundated by emails from other marketers? Are you inundating others? I have attended many seminars and read a lot of websites and I am here to tell you that you do not have to "do it all" to be successful at promoting yourself. There is one thing you must do. **You must be consistent in your message about yourself.** Remember that trust is cumulative. Your message about who you are and what work you enjoy doing should be the same on your website, brochure, and LinkedIn page. LinkedIn



(www.LinkedIn.com) is a free professional networking site. There are many networking sites but, at this writing, LinkedIn, Facebook and Twitter are at the top in terms of the number of people participating. Meetup.com is all about meeting other people in person. There are more and more professional networking groups available on Meetup. As I said before, you want others to be able to find you. When they find you, if you have prepared well for their arrival, your prospective clients will learn the things about you which you want them to know.

If you want to be efficient with the little time you have to develop a web presence, learn how to use LinkedIn and hire a pro to develop your firm's website and the Google AdWords campaign. LinkedIn is a great place for an attorney to set herself apart. This is assuming that you are already on local referral services like the Lawyer Referral Service of the North County Bar Association and LRIS of the San Diego County Bar Association. There are also sites like www.AVVO.com or www.Martindale.com where attorneys and opinions about them can be found. When I searched for sites that provide attorney listings, there were over 9,000,000 entries. Just like other social media, it is possible to spend a lot of time and money, but never actually differentiate yourself from your competition. It is my belief that quality clients, who are appreciative of the kind of work a professional produces, prefer referrals rather than just searching on the internet. Once

you have been referred, the prospective client should be able to find good information about you quickly and conveniently to bolster the referral and make the client ready to work with you. That your prospective client is looking for a way to get to know you, after having received a referral, informs how to design your website and LinkedIn profile.

I heard recently that 70% of adults with computer access now "Google" professionals before calling to make an appointment. When someone "Googles" you, what do they find? Google your name right now and find out. Now try Googling, "Marguerite Lorenz"

The writing you have done about you and your work is your starting place. Having this done will make it much easier to work with marketing professionals should you decide to delegate some of the work. The work to delegate is the website build and website advertising. This is truly an art and, unless you love learning all the technological ins and outs, it is much more efficient to spend money on someone who knows what they are doing than to take up any of your billable time. A website is a passive tool ready to receive the people who find you through a search engine or get your name from another professional. Your website should provide an easy way to contact you (like an email form) and some

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information about you and your services. If someone contacts you through your website, having a system in place so the client gets a personal response in 24 hours or less makes the client feel that you care. Many websites I looked at in preparation for this article are nothing more than business cards which sets the expectation that the prospective client must call for an appointment. If a client has sought out information about you on the Internet, that same client will want to exchange emails before making a phone call.

I suggest focusing your LinkedIn efforts to connect with professionals one at a time. LinkedIn, and the internet in general, is best thought of as just the beginning. Spam "direct mail on the internet" has never been an effective marketing tool. Requests to interact must be genuine and personal, not a shotgun approach. People notice and feel the difference. For efficient marketing, be the one to start and continue your relationships yourself.

In the beginning, establish a good website and LinkedIn profile. Then you are ready to search for other professionals to get acquainted with through LinkedIn (or ask other professionals you already know to introduce you). Your LinkedIn profile deserves two hours of your best writing so those who are lucky to find you know you are who you say you are. Once you are happy with your profile, you can use this text in lots of places. Consult a social media pro for a polished profile. A good current photo is a must. Once you start connecting with other professionals, you can ask for introductions to other professionals.

The "middle" is building the relationship. Meals together, personal phone calls, and mutual referrals are the goal. A great way to think about this: making friends. The best aspect of my work is the great people I work with. This is not selling, this is being. Being yourself with a new friend is the best way to make more friends. I have attended many networking events and given away lots of business cards. I have met with and worked with people who have invited me to get better acquainted. I have done no business with anyone who has taken my card just to send me email newsletters.

The "end" is that you learn what marketing techniques work for you and devote a few hours a week in an endless cycle of success for you.

So far, these suggestions may have taken four of your hours. You may be thinking that you have too

much work to do. You may be right; however, the best way to insure a steady stream of work is to let others know that you are available for more. Use your breakfast and lunch times wisely. Dedicate at least three meals a week to being with other professionals. Of those 12 or 15 meals a month, commit to three monthly meetings. The monthly meetings you take the time to attend should allow you to make two or three new acquaintances every month. It is up to you to take the next step and create a lunch or breakfast appointment to get better acquainted. Keep in mind that if you are hoping to get referrals, it is good to give them, but not every relationship will reciprocate immediately or often.

Some relationships take years to bear fruit. If you have identified the right client for you, this gives your new friends the opportunity to think of you when your right client appears in front of them. Still, the client might hesitate to call or just not follow the recommendations he received. Keep listening to these sources to learn why clients hesitate to make the call. You may be able to help this professional explain your services in such a way that the client can't wait to call you.

Asking fellow professionals repeatedly for referrals doesn't work as well as keeping them informed of relevant topics. After you have established relationships, writing articles, informative emails, keeping up a blog or updating your brochure might be good ways to stay in touch. Be prepared to meet another professional in person at least three times before you receive a referral.

Marketing is an ever-evolving process. Consistency is the main ingredient. Remember, your number one marketing tool is to be yourself.

Marguerite C. Lorenz, CTFA, CLPF has been a Professional Fiduciary for over 7 years and she is partnered with Jane B. Lorenz, CPA, CLPF and Clay Spiegel, CPA at Lorenz Fiduciary Services, Inc. Marguerite is the host for the "It's Your Estate" San Diego program, and has been published in professional periodicals and on the web. She currently serves as Chairman for the North County Estate Planning Group (www.NCEPG.com). You can learn more about her and her team at www.MyTrustee.net.

Don't miss any networking opportunities, search for "Estate Planning Group" in www.Meetup.com