



SMALL PRACTICE SUPPORT PROJECT

MARKETING WORKBOOK



CONTENTS

PAGE

1 **1** **Introduction**

3 **2** **Preparatory marketing questionnaire**

4 2.1 Overview of market and business

4 2.2 Marketing and planning

5 2.3 Marketing communications

6 2.4 Target markets

7 2.5 Resources and Collaboration

8 **3** **Marketing Plan Preparatory Analysis**

8 3.1 Introduction

9 3.2 Trend Analysis

10 3.3 Sources of Business Revenue

10 3.4 Current market segments

11 3.5 Competitor Analysis

12 3.6 SWOT Analysis

14 **4** **Phase 1: Situation Analysis**

14 4.1 Introduction

15 4.2 Questions to ask yourself – Environment Scan

16 4.3 Situation Analysis Table

17 **5** **Phase 2: Objectives**

18 5.1 Questions to ask yourself - Marketing Objectives

18 5.2 Services Marketing Objectives

19 **6** **Marketing Plan Framework Phase 3: Action Plan
by Marketing Objective**

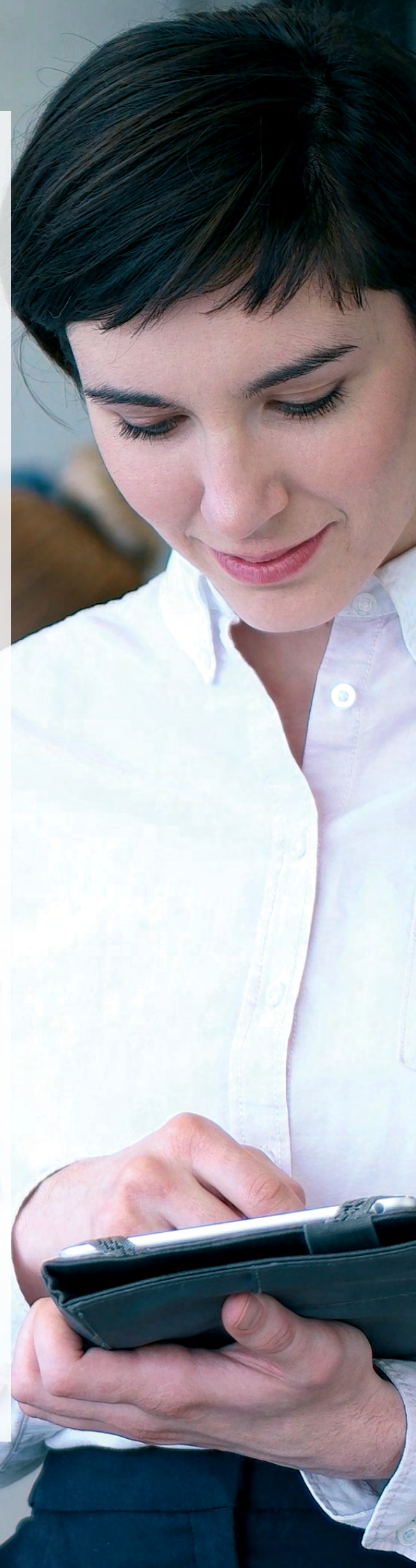
19 6.1 Introduction

20 6.2 Tips for completing the Action Plan

20 6.3 Questions to ask yourself – Action Plan

21 6.4 Action Plan Template

23 **7** **Conclusion**



1. INTRODUCTION

Recommendation 3 of the *Crowe Market Study of Sole Practitioners and Smaller Legal Practices in Ireland* related to the development of a formal marketing plan for sole practitioners and small practices.

RECOMMENDATION 3:

Develop a marketing plan as a key pillar of practice growth

It is recommended that sole practitioners and smaller practices increase their overall marketing efforts and capabilities. Client surveys will be an important building block in the development of a marketing plan based on understanding client needs and responding appropriately across all areas of interaction with the client.

The Crowe Report states: "Growing a business is dependent on effective marketing and the ability to communicate with existing and potential clients to convince them of their need to use the services on offer in the practice. Either as part of a Growth Strategy or a stand-alone plan, smaller practices need to formally plan their approach to marketing, including client communications. For some, this will be a case of formally documenting and monitoring what is already being done and, for others, it will involve evaluating marketing activities (or lack thereof) and increasing what is being done to promote the business.

Marketing is an area that is approached with some reluctance by solicitors because of a lack of experience, skill and/or belief in the

benefits of marketing, particularly when it hasn't been done in the past. It's important to realise, however, that in any crowded marketplace, you need to stand out and communicate compelling reasons in order to encourage clients to choose your law firm instead of another. This is especially true for smaller practices that operate in a highly competitive environment.

Smaller practices should, therefore, increase their marketing efforts and capabilities. You will need to adopt a strategic approach that is focused on the client, and which benefits from market research and clear objectives.

The purpose of this Marketing and Communications Workbook is to guide your practice to set marketing objectives and to formally plan future marketing activities. Working through each section will lead you to develop your own marketing plan. Approaches will differ depending on personal work style, the time available, time management, etc. However, you will need to set aside time to complete the document in order to create a successful marketing plan.

The workbook should be completed so that it aligns with your practice's Growth Strategy. You should take relevant sections from the Growth Strategy and use these in the marketing plan workbook.



There are five chapters in this workbook, which you should complete in the following order.

PREPARATORY MARKETING QUESTIONNAIRE

This section will get you thinking about your previous and current marketing activities.

MARKETING PLAN PREPARATORY ANALYSIS

This section is mainly based on the analysis section of the Growth Strategy, so that information can be copied over to the relevant areas. Overall, this chapter provides you with a brief overview of the current state of your business, which will influence the marketing objectives you chose to set and their corresponding activities.

PHASE 1: SITUATIONAL ANALYSIS

This section records information on your business environment, including: market and client trends; strengths; challenges; review of competition; and, finally, the Unique Selling Point (USP) of your practice.

PHASE 2: OBJECTIVES

In this chapter, you will set your practice's marketing objectives.

PHASE 3: ACTION PLAN

A break-down of your objectives, details of specific actions, and deciding how, by when, and at what cost each objective will be achieved.



2. PREPARATORY MARKETING QUESTIONNAIRE

The preparatory marketing questionnaire is designed to get you thinking in marketing terms and to think through what you have done, formally or informally, to increase awareness of your business and attract clients to your practice. This section is followed by more formal data gathering and analysis (based on the analysis in the Growth Strategy).

1. OVERVIEW OF MARKET AND BUSINESS

a) What are the core strengths of your practice that are influencing your current level of business?

b) What are the key challenges you are facing in a marketing context?

c) How do you compare to your competitors or to alternatives to your offering? Think about this from the client's perspective. Use information from the Growth Strategy, if you wish.

d) What is truly distinctive about your practice in terms of what you offer compared to your competitors i.e. what claims you can make that are unique to your practice? Is this reflected in your marketing activities?

2. MARKETING AND PLANNING

e) Do you have a marketing plan? If so, do you use it and update it and do you review your targets?

3. MARKETING COMMUNICATIONS

- f) What marketing tactics (both offline and online) do you currently use or plan to use when promoting your practice?

Offline:

Online:

-
- g) What are the most and least successful marketing activities you have used? What lessons could you learn that would help you to reproduce the success or improve in the future?

Most successful:

Least successful:

Lessons learned:

-
- h) How do you track your marketing performance?
-

-
- i) Give examples of 3 successful marketing campaigns that in your opinion are good examples for your practice (these may or may not be legal practices). Please be specific.

4. TARGET MARKETS

- j) How do current clients and prospects judge the practice and its competitors on the following:
Reputation

Quality

Service

Fee level

-
- k) How do your different client segments (see Growth Strategy) make their buying decisions in relation to legal services?

-
- l) What are the key factors which ensure clients choose your practice rather than the competition?
What would you do if competitors offered the same factors?
-

m) Do you know your target segments, and, if so, do you tailor your marketing activities and messages to match each segment?

n) What marketing channels do you use to reach your target markets?

5. RESOURCES AND COLLABORATION

o) What resources/budget have you allocated to your marketing activities?

p) What do you believe are the potential barriers to your practice in achieving its online and offline marketing goals? Please be specific.

q) In your opinion, how would you address or reduce those barriers. Please be specific.

r) Have you ever been involved in any joint marketing with other practices/businesses?
If yes, provide detail.

A photograph of two women sitting at a table in a meeting. The woman on the right has long, wavy brown hair and is wearing a dark grey zip-up top. She is looking down at a smartphone in her hands. The woman on the left has long, wavy blonde hair and is wearing a blue denim shirt. She is looking towards the first woman. The background is a light-colored brick wall. The lighting is warm and natural, suggesting an indoor setting with large windows.

3. MARKETING PLAN PREPARATORY ANALYSIS

3.1 Introduction

The Marketing Plan Preparatory Analysis provides a brief overview of the current state of your business. If you have completed the Growth Strategy Workbook, you will be able to take sections from the analysis chapters of the Growth Strategy and use them in this section of your marketing plan. Tables 3.3, 3.4, 3.5 and 3.6 have all been taken directly from the Growth Strategy Workbook.

3.2 Trend Analysis

This section requires you to describe the main trends within the market and/or practice over the past few years. The time span might be 2 to 4 years, but the time span does not matter as much as the fact that the trends come to your mind when asked this question.

IMPORTANT TRENDS WITHIN THE MARKET AND/OR PRACTICE IN RECENT YEARS	WILL THESE TRENDS CONTINUE OVER THE NEXT FEW YEARS?	ARE THEIR EFFECTS POSITIVE (+) OR NEGATIVE (-)?

3.3 Sources of Business Revenue

Breakdown your practice's current client segments, from the list presented below (add and delete as appropriate). *Insert from Practice Performance in Growth Strategy.*

CURRENT CLIENT SEGMENTS	PERCENTAGE OF TIME (WHERE AVAILABLE)	PERCENTAGE OF REVENUE (WHERE AVAILABLE)	PERCENTAGE OF PROFIT (WHERE AVAILABLE)
Private individual	%	%	%
Small enterprise	%	%	%
Medium enterprise	%	%	%
Large enterprise	%	%	%
Government body	%	%	%
Start-up	%	%	%
Not for profit	%	%	%
Other	%	%	%

3.4 Current market segments

Breakdown your practice's current business client base into the industry/sectors in which clients operate. See options in the list presented below (add and delete as appropriate): *Insert from Client Profile in Growth Strategy.*

CURRENT CLIENT SECTOR GROUP	PERCENTAGE OF TIME	PERCENTAGE OF REVENUE	PERCENTAGE OF PROFIT
Agri, Forestry and Fishing	%	%	%
Construction	%	%	%
Education	%	%	%
Energy and Water Supply	%	%	%
Financial Services	%	%	%
FMCG	%	%	%
Food Services	%	%	%
Government	%	%	%
Healthcare and Pharmaceutical	%	%	%
ICT	%	%	%
Legal	%	%	%
Manufacturing	%	%	%
Media and Advertising	%	%	%
Medical	%	%	%

Not for Profit and Voluntary	%	%	%
Professional Services	%	%	%
Real Estate	%	%	%
Retail and Wholesale	%	%	%
Telecommunications	%	%	%
Tourism and Hospitality	%	%	%
Transport and Logistics	%	%	%
Other	%	%	%

3.5 Competitor Analysis

Below is an example of the table you can use to complete your practice's competitor advantage profile.

Insert from Competitor Analysis in Growth Strategy.

COMPETITOR SERVICE CHARACTERISTIC	HIGH	MEDIUM	LOW	NOT PRESENT
Personal Service				
Trusted Advisor				
Responsiveness				
Long standing relationship				
Competitive fees				
Level of commitment				
Convenience of location				
Specialist expertise				
Established practice				
Continuity of staff				
Opening Days/Hours				
Accessibility/Location				
Timely delivery on cases				
Other				

3.5 SWOT Analysis

Below is a sample SWOT Analysis. A SWOT Analysis outlines the strengths, weaknesses, opportunities, and threats relating to your business. You can update the SWOT below for your own practice by adding/deleting the examples relevant to your practice or by inserting the SWOT analysis in your Growth Strategy Workbook (and also completing columns 2-4).

STRENGTHS (Sample list from Growth Strategy, to be modified)	NECESSARY FOR FUTURE COMPANY GROWTH	COMPETITIVE ADVANTAGE YES/NO	CAN BE EXPLOITED MORE THAN AT PRESENT (+) OR NOT(-), AND IF SO HOW
<ul style="list-style-type: none"> • Reputation for personal service • Local knowledge • Client responsiveness • Full practice areas • Ability to cross sell to existing clients • Location of business • Highly skilled workforce • Strong network, good referrals • Strong balance sheet, ability to invest if needed • Strong brand, known locally • Low bad debts • Broad client profile • Improved and streamlined financial management • Increase in business development and marketing 			
WEAKNESSES (sample list)	DIMINISHING COMPETITIVE ADVANTAGE	SURVIVAL THREATENING YES/NO	CAN BE DEALT WITH (+) OR NOT (-)
<ul style="list-style-type: none"> • Insufficient specialist expertise • Capacity constraints • Lack of business development skills • Fee levels v. time input • Insufficient technology skills • Expectation for principal to be client facing at all times • Insufficient formal client feedback • Time management and time pressures • Outdated website • Insufficient business planning • Recruitment and staff retention issues • Succession planning • Stress management • Managing client expectations 			

OPPORTUNITIES (Sample list)	NECESSARY FOR FUTURE COMPANY GROWTH	COMPETITIVE ADVANTAGE YES/NO	CAN BE EXPLOITED MORE THAN AT PRESENT (+) OR NOT (-), AND IF SO HOW
<ul style="list-style-type: none"> • Greater investment and application of IT systems • Improving economy • New business park and 4 x residential housing developments in the area in next 18 months –opportunity to increase client base • Regulatory and compliance obligations of client • Structural changes i.e. professional alliances • Main competitor is near retirement • New markets and practice areas • Expansion of new and existing networks • Positive promotion of the value of sole practitioners and smaller practices • Avail of more CPD programmes 			

THREATS (Sample list)	DIMINISHING COMPETITIVE ADVANTAGE	SURVIVAL THREATENING YES/NO	CAN BE DEALT WITH (+) OR NOT (-)
<ul style="list-style-type: none"> • Lack of investment for growth and development • Uncertainty around Brexit – clients are delaying actions or client projects are on hold • Lack of talent available locally • Available work is not sufficiently profitable • Changing client needs and consumption trends • Solicitor regulatory and compliance obligations increasing resulting in time and cost to manage • Rising overhead costs • Competition in traditional areas of practice, larger firms and non-legal providers • Competitor merger a possibility 			



4 PHASE 1: SITUATION ANALYSIS

4.1 Introduction

The situation analysis includes, on one table, market and client trends (which can build on those in Table 3.2), strengths of and challenges for your practice as well as a competitor review. The analysis should inform the development of your practice's Unique Selling Point (USP). In other words, what elements of your practice are unique to you. Prompt questions are included overleaf.

4.2 Questions to ask yourself – Environment Scan

Set out below are a range of questions that should help you in setting your marketing objectives and subsequent marketing plan.

Market and Client Trends

- How is your business performing now?
- How is the local legal market performing?
- How is it expected to grow? (use research and statistics where possible)
- What markets offer the best possibility for growth?
- What new areas of law are being developed?
- What client needs continue to be in demand and viable?
- How have clients' needs and behaviours changed?

Strengths

- What elements of your offering have performed strongly?
- What positive comments do clients make about you/your practice?
- How do you take advantage of your strengths in growing your practice?

Challenges

- What elements of your offering provide you with the least return on investment?
- What elements of your practice need most improvement?
- How can you overcome the key challenges to your practice?

Competitor Review


- Who are your direct competitors for your key offerings?
- Who are your indirect competitors?
- How do your direct and indirect competitors rate against your practice on:
 - Fee levels
 - Reputation
 - Quality
 - Service
 - Capacity

Unique Selling Point (USP)

- What elements of your offering is unique to just you?
- How can you use your uniqueness to gain a competitive advantage over your competition?
- What are the weaknesses in your competition's offering that you can capitalise on?

4.3 Situation Analysis Table

MARKET AND CLIENT TRENDS	STRENGTHS	CHALLENGES	COMPETITOR REVIEW	UNIQUE SELLING POINT



5 PHASE 2: OBJECTIVES

The second phase of the marketing plan framework focuses on setting the goals you want to achieve through implementing the marketing plan. It addresses the “seven elements of the service marketing mix”, which are outlined below. Each of these elements should be considered when you are writing up your objectives. You may have more objectives in some areas than others, and equally some may not be relevant at this point in time for your plan, but all should be considered and reviewed over the lifetime of the plan. The next section of the workbook is where you complete the action plan to reach the objectives.

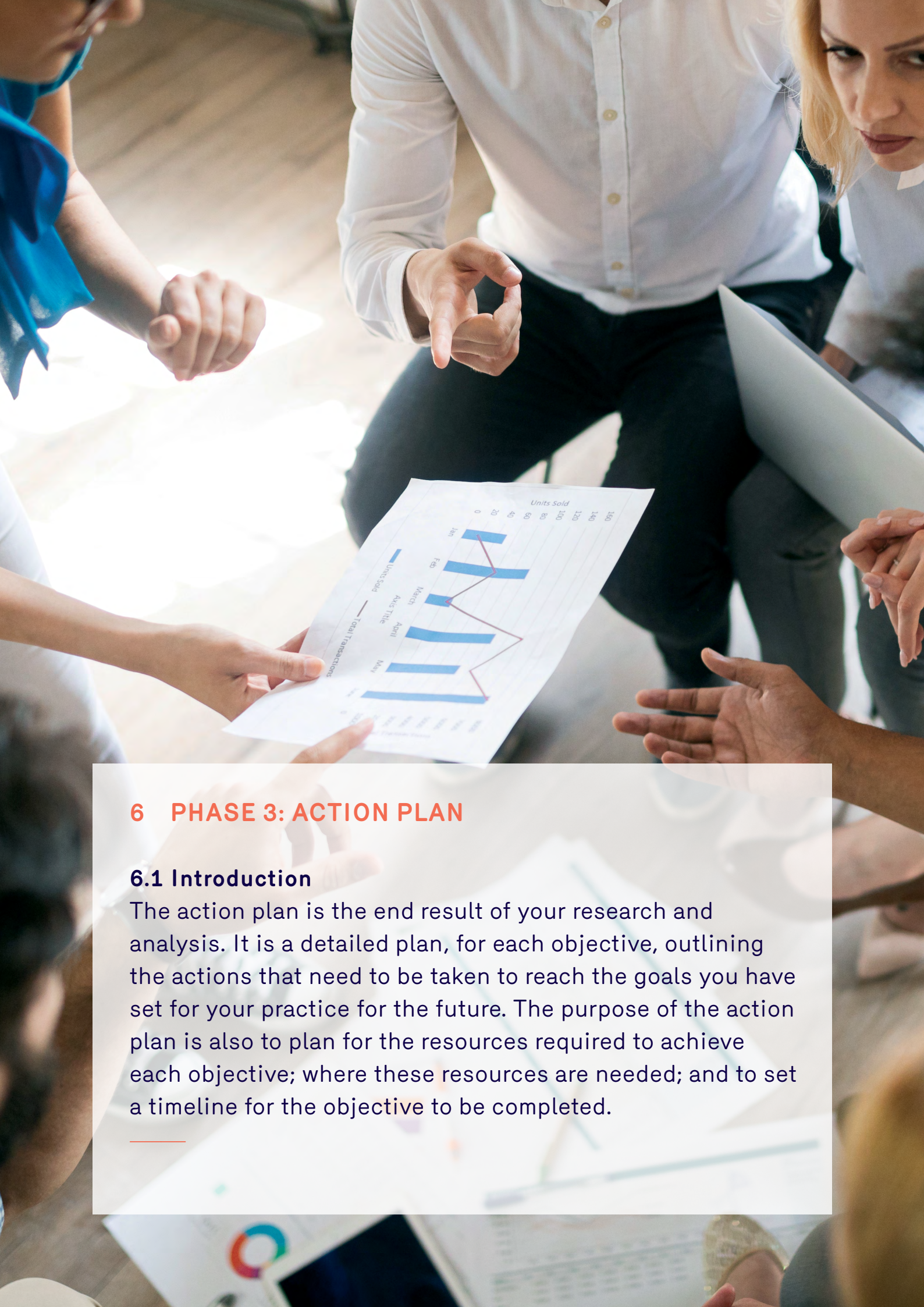
5.1 Questions to ask yourself - Marketing Objectives

- What are the overall goals you want to achieve from the marketing plan (which should link back to your Growth Strategy)? List each objective and the marketing activities you will use to achieve each objective.
- Think about the **seven elements of the service marketing mix** and define marketing objective(s) in each relevant area:
 1. Product and/or service,
 2. Price,
 3. Place (i.e. location),
 4. Promotion:
 - Branding,
 - Advertising,
 - Sales,
 - Publicity,
 - Direct marketing (mailshots, email marketing, ezines), and
 - Social media (blogs and social media sites).
 5. People,
 6. Processes (service delivery processes that impact service standards), and
 7. Physical evidence (tangible parts of service offering that improve customer experience, for example, well-designed waiting area).

5.2 Services Marketing Objectives

My overall marketing objectives are:

PRODUCT/SERVICE OBJECTIVE(S)	
PRICE OBJECTIVE(S)	
PLACE OBJECTIVE(S)	
PROMOTION OBJECTIVE(S)	
PEOPLE OBJECTIVE(S)	
PROCESS OBJECTIVE(S)	
PHYSICAL EVIDENCE OBJECTIVE(S)	



6 PHASE 3: ACTION PLAN

6.1 Introduction

The action plan is the end result of your research and analysis. It is a detailed plan, for each objective, outlining the actions that need to be taken to reach the goals you have set for your practice for the future. The purpose of the action plan is also to plan for the resources required to achieve each objective; where these resources are needed; and to set a timeline for the objective to be completed.

6.2 Tips for completing the Action Plan

- Breakdown target markets specifically (as you may need a more specific message for each of them, and different channels to reach them).
- Use and adapt the USP you have included in the Situation Analysis to come up with relevant marketing messages for each target market, and think about how to make it clear to them how your practice is different from, rather than the same as, other practices).
- Make sure you have included communications channels to reach all target markets, for example, if your market is going to include age groups that may not be online, how will you reach them?
- Go back through each action and make sure it relates back to the objective.
- Make sure that actions are included for all of the plans regarding communications channels and metrics, for example, if you are going to target the corporate market via social media, make sure you plan to either set up or build on your LinkedIn page and if you are going to monitor sales targets, make sure you have set specific targets that can be measured.
- Breakdown all actions into the tasks, for example, if local PR is included, break it down into tasks, for example, create database, write media release, send out media release, follow-up calls, invite media to launch, include media coverage on website.
- Add specific targets within your metrics so they can be monitored, for example, increase number of Twitter followers from 'X' to 'Y' (include numbers).
- Include details of how the metrics will be monitored and reported on, for example, management meetings, staff meetings, etc.
- Use the prompter questions overleaf as you complete each section and look through the questions at the end to check whether there is anything you have left out.

6.3 Questions to ask yourself – Action Plan

The questions presented below are to assist you in drafting your practice's marketing action plan.

Target Market

- Are there segments in your market that are being underserved?
- Are the segments for your service big enough to be viable?
- Does your market want or value your unique competitive offering?
- What segments should you be targeting?
- Who exactly is your target customer for each segment?
 - What are their purchasing criteria?
 - What do they like/dislike?
 - Who influences them most?
 - Where do they go to get their information?

Communications

- What are the best communication channels for each of your target markets?
- What is your communications budget?
- What does your website say about you?
- Are you present in the right social media channels?
- Are you talking to your clients when and where they are able to make a decision?
- Do you carry out enough PR? Is your offering newsworthy?
- Are your offline communications integrated with your website and online communications?
- Is your brand clearly communicated?
- Can you carry out joint marketing initiatives with anyone?

Metrics

- What are the key indicators that need to be measured to ensure you are successful?
- How can you measure return on investment for your offline marketing efforts?
- How can you measure return on investment for your online marketing efforts?
- How frequently should you review the effectiveness of your marketing plan?

Monitoring

- What methods will you use to monitor the achievement of objectives and targets?

Review and reporting method

- What methods will you use to review and report on the achievement of objectives and targets?

6.4 Action Plan Template

OBJECTIVE 1

Target Market and Marketing Message

Communications Channels

Offline

Online

Metrics

Offline:

Online:

ACTIONS	RESPONSIBILITY	DEADLINE
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MONITORING METHOD	
REVIEW AND REPORTING METHOD	

CONCLUSION



Due to ever increasing competition in the professional services sectors, combined with the continuously changing demands of clients, it is more important than ever for practices to carefully plan their marketing activities. A well-researched and considered marketing plan, along with a complementary Growth Strategy, will be a key element in either sustaining or growing a practice into the future.

Having a planned approach to practice growth through the creation of a marketing plan and Growth Strategy will help increase the chances of your practice growing. It will also help you to identify possible inhibitors to growing your practice, and to plan to overcome these challenges.

This marketing plan could be a standalone document, but will work best and be most relevant combined with your Growth Strategy.



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NOTES

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