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Seven Elements of an Effective Marketing Program

By Susan Saltonstall Duncan

Are marketing and PR the same thing?

"Not at all," says renowned marketing expert Sally Schmidt, President of Schmidt Marketing, Inc. in Minnesota. "Many firms still make the mistaken assumption that external communications and public relations are all a firm needs to do to have an effective marketing program. Since marketing and PR skills are different, a firm must first determine its priorities in order to build an effective marketing program." At the 2001 Annual Conference of the Association of Legal Administrators in Baltimore, Schmidt provided a roadmap in her presentation entitled, "Building Your Marketing Infrastructure: Managing Marketing Resources."

Seven elements

Schmidt outlined the seven primary elements of a firm's marketing program and described the types of functions and activities that fall within these categories.

1. **External Communications and Relations:** Advertising, public relations, direct mail, newsletters, collateral materials, seminars, web site, organizational and networking events.
2. **Business Development:** Targeting and lead generation, prospect research, proposals and new business pitches, contact management tracking.
3. **Internal Communications and Relations:** Marketing intranet, internal

newsletter, liaison to offices, practice and industry groups, management and marketing committees.

4. **Planning and Strategy:** Firm and practice area goals, objectives, strategies and plans, pricing strategies, branding and positioning.
5. **Research and Development:** Client satisfaction and retention, image and perception surveys, competitive analyses, trends and opportunity tracking by services and industries.
6. **Support and Accountability:** Coaching and marketing training, technology, lawyer compensation strategies, follow-up.
7. **Management and Administration:** Budgeting and tracking, staff training and supervision, department systems and procedures, repository function, managing outside vendors, firm activities coordination.

Each of these areas requires specific skills and various levels of involvement. Much of the marketing program's strategies will be developed and executed at the practice group level, while other functions and responsibilities will fall to the firm, individual attorneys or the marketing department.

Given the broad range of skills required of the marketing staff who will direct or support these areas of marketing responsibility, Schmidt cautions firms not to expect that they will be

able to hire one person to fulfill all these roles. For example, a person who is experienced in writing press releases and executing media relations is not likely to be the same person who is experienced in strategic marketing planning and business development. This is why you must first establish your priorities.

Six Planning Steps

Before deciding what you should do, how you will do it and who will do it, Schmidt suggests there are six planning steps a firm must take to effectively build the appropriate marketing infrastructure for your firm.

- First, create your firm's marketing structure by defining your firm's marketing "units" by office, industry groups, practice groups, individuals, and key client teams. Where will goals and strategies be developed and executed?
- Second, establish the firm's priorities. What are the firm's goals? Are they to increase individual marketing efforts, increase cross-selling, develop a strong brand, or improve client satisfaction?
- Third, ask the marketing "units" to develop plans that include goals and objectives, target markets and companies, strategies and activities and resources.
- Fourth, assess firmwide needs and create a master plan of all strategies and activities and designate the person responsible for each activity.
- Fifth, align your resources by identifying your needs for marketing staff, other staff, outside resources, the budget and any other support.
- Sixth, establish marketing management and coordination methods, including meetings, newsletters, intranet or e-mails, database and reporting requirements.

Once you have undertaken this planning process, you will be in a better position to understand your marketing staff needs, whether the staff will be centralized or assigned by office

or practice area, whether you will need generalists or functional specialists and what level the priorities you have identified call for in terms of skills and level of experience, according to Schmidt.

Pieces of advice

To ensure success as you build your marketing staff and program, Schmidt shared several pieces of advice:

- Before you hire marketing staff, figure out what you really need. Survey the partners and investigate other firms your size.
- Write a clear job description and use the appropriate title. Establish short-term objectives and provide the right level of support. Position the position appropriately within the firm, including the size and location of the individual's office, what management information the individual receives and the meetings to which the individual is invited.
- Give the new position a chance by educating the lawyers about the position and being realistic about expectations and results.
- Don't underestimate chemistry: the marketing person embodies the marketing function. When hiring your marketing staff, be willing to forgo some skills sets in exchange for the right chemistry.

"Remember that every firm is different, has different priorities and has different clients or market targets that require different types of marketing strategies. How you structure your marketing department and decide who to hire should be based on what you really need and what you are prepared to support. Determine your priorities, identify the skills you need before hiring, commit the appropriate support and resources, then start small and build on your successes," concluded Schmidt.

Susan founded her legal consulting firm of Saltonstall & Associates in 1987 and is

President of Rainmaking Oasis, Inc., a company that blends consulting with technology tools to make marketing plan development, management and implementation more meaningful and effective. Susan was a founder of the Legal

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