

Welcome to Essential Legal Business Skills Workshop

Chair: Andrew Meehan Harrogate Family Law



Yorkshire Courses
for Lawyers

ann@yorkshirecoursesforlawyers.co.uk

• 07921540039 •

*Yorkshire quality training for Yorkshire lawyers
Supporting you to excel at legal
business management skills*

www.linkedin.com/in/annpage

Speakers:

Ann Page's Bio

She is the founder of Beyond the Brief, a specialist business delivering strategic coaching, leadership; management and interpersonal skills training for the senior members (and those aspiring to be) of the legal profession. A Top 100 Lawyer of the Year, with an impressive CV over a 30-year career as a senior in-house lawyer delivering first class legal services. She holds an HNLP certificate in coaching as well as being a certified NLP Master Practitioner. Ann has delivered leadership, performance management training for the last 12 years to nearly 7000 lawyers.

Fiona Gillam's Bio

She (BA Hons) qualified as a Solicitor in 1988 and has spent over 20 years in private practice specialising in both residential and commercial conveyancing, developing a particular interest in unregistered titles and complex leasehold transactions. Now non-practising, she runs her own risk and compliance consultancy, is a Lexcel Assessor and Consultant and writes, edits and presents compliance materials. She is a passionate believer in clear, jargon-free communication, combining her extensive experience and her auditor's eye for detail, resulting in a refreshingly practical and interactive training style.

Welcome to Business Development: Marketing

Ann Page – Beyond the Brief



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Developing your marketing plan

1. What is marketing?
2. Why have a marketing plan
3. Marketing plan exercise
4. Know your competitors: and understand how is your firm standing out from the crowd
5. Seven P's for successful marketing
6. Time managing your marketing activities



Marketing is.....

The role of marketing in law firms is to create goodwill,
which provides the platform for selling

KNOW

LIKE

TRUST

*Marketing is not selling – it is about raising profile to
serve more clients!*

Why have a marketing plan

1. To help you to **control** your legal business by making things happen as opposed to waiting for clients to come to you
2. **Crystallise** your business development thoughts, aspirations, growth goals and put them into writing
3. Use your **plan** to improve time management by adding focus and then tracking what works
4. ***Eight different ways to build a daily/weekly marketing habit – page 3 for you to take into your marketing plan***

Page 7 Question Class exercise

- Which clients is my plan aimed at?
- E.g. new – existing – age group – specific communities



Marketing Plan Introduction – What clients is my plan aimed at? Page 7 Exercise

- Who do I help
- *Lawyers in Yorkshire*
- To do/understand
- *understand marketing better*
- To achieve
- *To reach and serve more clients; and have a sustainable business going forward*



Page 7 Question: Class exercise

Which clients is my plan aimed at? 2nd Step:

- who is my ideal client
- and what are their challenges?



Who is the competition for me or my firm? Page 9

How many are competing in your

1. Geographical area
2. Client
3. Sectors
4. Specialism

How is you and your firm standing out from the crowd? Questions to take away



Marketing 7 P's for successful marketing

1. **Planning** – what market research do you do?
2. **Product** (services) – what you offer?
3. **Place** – where you offer it – route to market?
4. **Price** – what & how you charge?
5. **Process** – how is it delivered?
6. **People** – who is involved in delivering the service?
7. **Promotion** – how you communicate what you do on your **website** or other? *Is it clear, concise and consistent?*



Sources of Value/Competitive Advantage

1. Personal relationships
2. Location
3. Proximity
4. Deep local knowledge of your community
5. Specialisation that is respected in the market place
6. One stop shopping
7. Online products/packages
8. Transparent Prices – *are they on the website?*
9. Winning Statistics – *100% client satisfaction*
10. How do you WOW the client?
11. *What solutions are you offering that are different?*

Marketing Plan Take Away Exercise

- What is the most profitable service that I deliver?
- What promotional/marketing tools am I going to use?
- How much shall I spend?
- How much time do I need to spend? **Pages 3/11**
- How does IT help – do you have a CRM or Xcel spread sheet to track your marketing activities?



Code of Conduct: Aspects of Business Development

Fiona Gillam – My Compliance Colleague



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Publicity

- Letterhead and email footers - page 1
- Stationery – page 1
- Website
- Lexcel requirements



Referrals: pages 3-4

- What's allowed?
- What's prohibited?
- Referral Agreements and other arrangements
- Telling the client
- Signposting to third parties



Going forward – wisdom is applying your knowledge

- **Business Development/Marketing Plan Check (1 CPD)** by Ann Page - 1 hour consultation on your plan would normally cost £150 – a special price for those who have purchased the webinar is £75 – *that is a saving of 50%*
- **Compliance check of Aspects of Business Development** would normally cost £000 – special price for those who have purchased the webinar is £00 – *that is a saving of 00%*
- ***Any telephone clarifying queries on the slides or notes is complementary!***