

Connecting with Clients Online

Ann Page – Beyond the Brief

Fiona Gillam – My compliance Colleague



Yorkshire Courses
for Lawyers

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

www.linkedin.com/in/annpage



Expert 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.

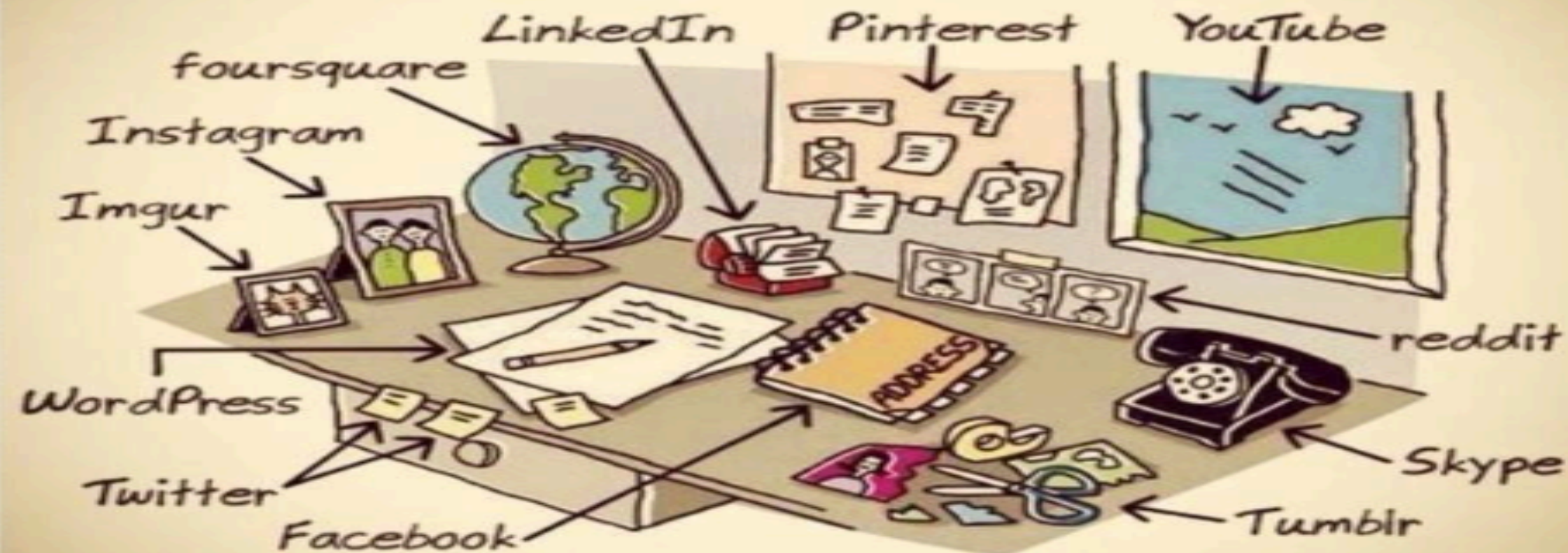


Agenda for this Session

- **What is social media? Overview**
- How important is LinkedIn and how can we use this to our advantage with a LinkedIn strategy:
 - **Defining Goals**
 - **Plan the Logistics**
 - **Conversion Map**
 - **Measurement Process**



the world before social media...





What do we mean by social media?

- Ways to communicate with people instantly and globally
- Which one supports you and your legal practice?
- LinkedIn began 5th May 2003 – went public on 29th May 2011
- 2 new users join every second – average income is £70K
- 42 million mobile visitors per month
- **25 million LinkedIn profiles viewed every day**
- 56% are male – 44% are female



LinkedIn Strategic Plan

1. Define your goals - What do you want to achieve?

- a) A profile that is attractive to your target market not a CV!
- b) Position you as an expert
- c) Be the thought leader – standing out from the crowd

2. Plan the logistics to:

- a) Grow your connections?
- b) Produce content schedule?

3. Conversion Map

- a) How are you going to convert your connections into leads / sales?
- b) What ‘mechanisms’ will you use?

4. Measurement Process

- a) How will you measure your progress?
- b) How will your CRM plan show this activity



1. a) Profiles Quiz – where we are now!

Linked





Profiles of attendees

- For the quiz – snapshots of their profiles were shown – suggest that you have a look at yours in connection to the quiz questions
- *Since the course 80% of attendees have changed their profiles*



1. a) 6 Suggestions for improving your profile

1. Complete all the profile questions you can
2. Have a professional photo and a personal statement
3. Use your profile to provide more information about you and what you can do for clients rather than just a list of jobs you have held
4. Use professional headline to your advantage – *search functions* - Amanda
5. Be active - request recommendations and join groups
6. Share your successes

Justine Osmotherley commented on this



Justine Osmotherley

Head of Private Client Services at Clarion. Putting clients at ease with a practical ...

Delighted to have been awarded Female Role Model 2015 at the professionals ball in Leeds yesterday. Lovely trophy too!!



Like • Comment • Share • 21 7



1. a) Another more client focused approach to profiles

- **Start with Questions**

- *Do you love Yorkshire?*
- *Do you agree that to stay ahead your legal skills need as much constant evolvement as your technical ones?*

- **May be add current news updates – 2 with pictures from Rachel – inheritance tax & digital assets**

- Or testimonials - ***‘A force to be reckoned with’ – ‘A truly collaborative lawyer’ Andrew***
- *Or ask for recommendations – (Newcastle)*

Summary

I am enthusiastic about providing lively and engaging training so that all participants leave inspired to implement their agreed action plans. **Over the last 10 years I have been privileged to train/coach nearly 6500 lawyers on leadership, management and interpersonal skills.**

I worked for nearly 30 years for a number of PLC's as a senior in-house legal adviser and manager. During that time I was responsible for leading and developing lawyers, as well as providing first class legal services. *My last client survey achieved 100% satisfaction rating.*

This passion for excellent client service informed my leadership of the Law Society Commerce and Industry Group where I initiated a number of firsts for the group; and in 2003 I was recognised as a top 100 lawyer. Malcolm Whalby from the committee said: "Ann exercises the highest degree of integrity at all times and combines this virtue with the ability to work like a dynamo at a very senior level. Ann is clear-sighted in her vision of what she wants to achieve. It was a great pleasure to work with Ann for five years at the Commerce and Industry Group."

My new dedicated website (www.managingexternallegalresources.co.uk) to provide specific consultancy and coaching to my home market. It also builds on the success of my book, Managing External Legal Resources and on the collaborative venture with in-house lawyers - General Counsel Research Club.

My new site contains blogs specifically for in-house lawyers on the diverse challenges they face today as well as more detailed information on how I can help you achieve your goals. Charlotte Birks (Senior Company solicitor Unum Group UK) says "Ann is a trusted confidant who is able to lead and support the business/senior legal counsel with difficult/political legal issues, including leadership and engagement."

My long-term training vehicle www.beyondthebrief.com continues to deliver training to private practice from master classes for partners to management stage 1 and 2.



1 b) and c) position yourself as authority/thought leader

Participate in 'Groups'

- Join groups which contain your target market
- Start a user group that will attract your clients
- Be active, take part and contribute
 - **Post content**
 - **Start discussions**
 - **Ask questions pertaining to your area of expertise**
 - **Comment on other's work in your area OR just press the like button**



Alison Ashworth likes this

2d



New decision on "public interest" test for whistleblower protection

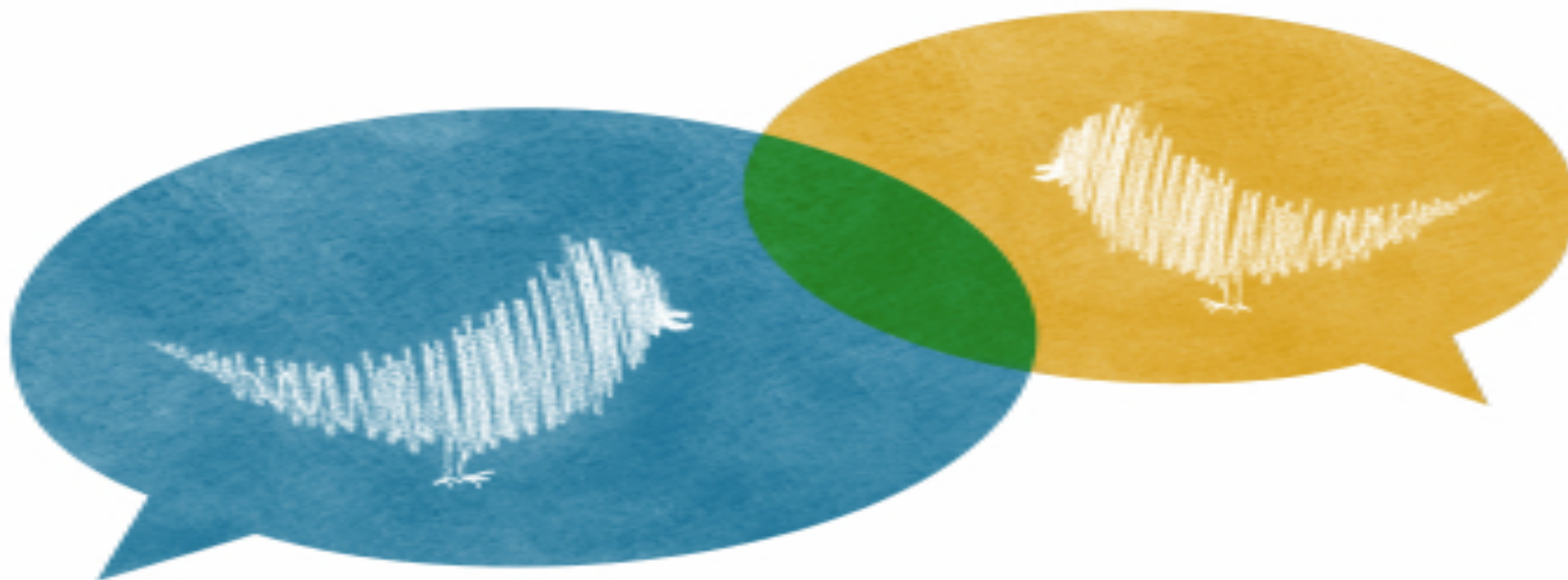
Alan Lewis · We now have the first decision on appeal which has considered the 'public interest' test introduced into the whi...

Like · Comment · Share ·  5



2 a) “Growing Your Connections

Getting to Know Like and Trust - Online





2. a) Grow Your Connections on LinkedIn (1)

Add Connections from:

- Outlook / Hotmail / Gmail address books
- Previous & Current Clients
- Prospects you have met
- People you meet networking



NO to competitors

Business Cards

Newsletters

**“Link to your LinkedIn profile
EVERYWHERE”**

Other Marketing Material

Emails signature information

PowerPoint slides

Websites

Receipts/Invoices



2. a) Grow Your Connections on LinkedIn (2)

- Use the Search Function to search for your target market - Location, job role, company?
- Leave a personalised message where you can – Select ‘done business with you’ or ‘friend’ as How do you know....

***Aim to connect with 10-15 people per day – Jason Squires
social media guru***



2. b) Content to build engagement - K.L.T.

How often - 2 updates daily

When

1x Update before 9am

1x Update just after 5pm



How - www.HootSuite.com

2. b) Post links to your own website blogs and/or news

The perils of social media

Admin | June 10 2015

Social media is a bit like fire: a useful servant but a dreadful master... Used carefully, it is an amazingly flexible and impactful way of reaching thousands, maybe millions of people with your message, and who wouldn't welcome that kind of publicity? Everyone can have a voice on social media and I for one welcome...

[Continue Reading →](#)

CPD? RIP!

Admin

CPD? RIP! The SRA's Competence Statement has had a mixed reaction among lawyers. There were, of course, some firms who were already looking at the wider picture and asking whether mere accrual of CPD hours was in fact a helpful benchmark of a lawyer's capability. Many lawyers I have talked to though, are so busy...

[Continue Reading →](#)

LATEST POST



SRA changes to learning and development

A guide for In-house Lawyers to Professional Development following changes to the training requirements by the SRA as at April 2015
Brief overview of the changes instituted by the SRA There is no longer a need to commit to a specific number of training hours (16 hours) or accredited training (the S.R.A. no longer accredit...



2. b) Where to find content for blogs?

- www.BlogLovin.com
- Trade publications
- Industry magazines/news outlets
- Google Search: “Your industry + blog”

Jason Squires – social media guru





2. b) What else can you post by Jason Squires

Your Business...

- What are you doing?
- Where are you going?
- Company news / updates

Your Clients...

- Previous projects
- Projects your working on at the moment?
- Client feedback / case studies



Tim Hamilton commented on this



 GC HUB



GC HUB's here. Please take a look ...

Richard Fleetwood • GC HUB goes live Thursday 7 May! It's a very big day for the country with the General Election today and it's also a really big day for us from 12 noon. It's been a bu...

Like • Comment • Share •  16  8

Show previous comments



Claire Simpson Looks interesting! Good luck with the launch!

16h



Tim Hamilton Well done Richard - this looks great. I hope it is a great success for you

1d

Add a comment...



2. b) *“So, What Do You Post?”*

**Maintain a ratio of 4:1 – 4
informational items to one
about your services**

TYPES OF INFORMATION





• Monday

- **Update 1:** Industry news
- **Update 2:** Demonstrate knowledge

• Tuesday

- **Update 1:** Call to action
- **Update 2:** Ask a question

• Wednesday

- **Update 1:** Talk about your business
(no call to action)
- **Update 2:** Share a case study

Thursday

- Update 1:** Industry news
- Update 2:** Call to action

Friday

- Update 1:** Ask a question
- Update 2:** Talk about your
business / sign off for the
weekend



3. a) Lead Generation Activity – Jason Squires

- **‘Calls to action’ (Helena)**

- Give you a call
- Send you a message over LinkedIn or through their work address
- Grab a coffee / Get a date in the diary

- **Asking Questions**

- Increases Engagement
- Provides feedback / market research
- In groups or direct

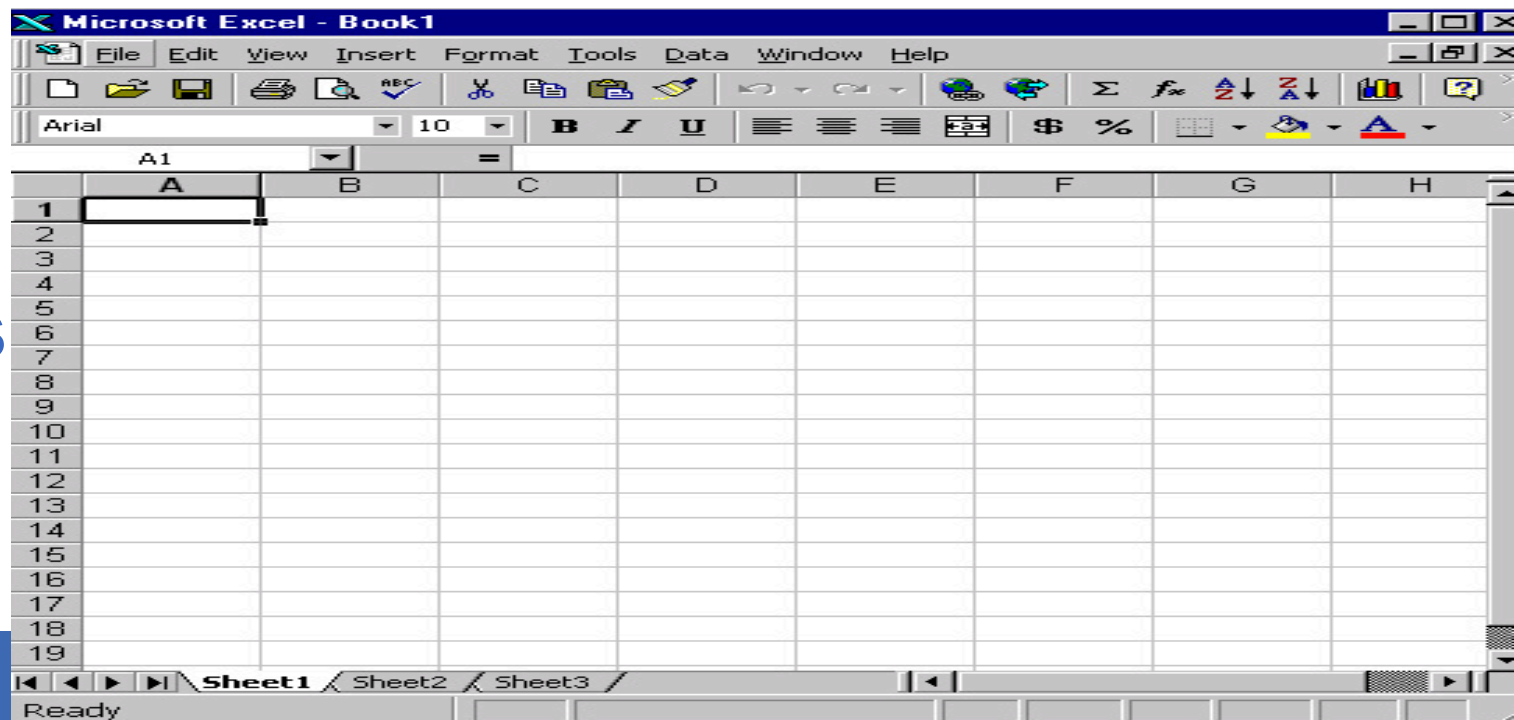
Know Like Trust on/off line





3. b) Follow Up

- Follow up with **new connections** via private message
- Which contains a soft call to action
 - Telephone call
 - Free consultation
 - Website traffic
- **Track your responses**





4. Tracking Return On Investment

Create a system internally to track the source of all new business (monitor monthly) if you don't already have one

1. Start asking '**How Did You Hear About Us?**'
2. Track monthly **website traffic** achieved from LinkedIn or Google analytics or www.ifttt.com
3. Track leads generated through **Following up spread sheet**
4. Monitor the growth of **number of Connections and who and when they turn into clients**



4. Example of Monthly Online Monitoring by Jason Squires

	Jun	Jul	Aug	Sep	Oct
Connections					
Website Traffic					
Website Enquiries					
DM Leads					
Adhoc Enquiries					



4. It gives you information re progress

The screenshot shows the top navigation bar of a LinkedIn profile. On the left is the LinkedIn logo. To its right is a search bar with the placeholder text "Search for people, jobs, companies, and more...". Below the search bar is a dark navigation bar with links for "Home", "Profile", "Connections", "Jobs", and "Interests". The main content area has a light blue header with the title "[The Death Of Coaching - What They Will Never Tell You About Growi](#)". Below this is the profile information for Ann Page, who is the "Managing External Legal Resources". To the left of her name is a circular profile picture of a woman with blonde hair. Below her name is the text "Your recent activity". To the right of the profile information, there are two statistics: "6 people viewed your profile in the past 3 days" and "787 connections. Grow your network".

h®

Search for people, jobs, companies, and more...

Home Profile Connections Jobs Interests

[The Death Of Coaching - What They Will Never Tell You About Growi](#)

 **Ann Page**
Managing External Legal Resources

Your recent activity

6 people viewed your profile in the past 3 days

787 connections. Grow your network



4. LinkedIn Marketing In 15/20 Minutes Daily

Monday to Friday set your alarm for a set time

- ✓ **Add your content** (or schedule it in HootSuite)
- ✓ **Check for updates / notifications**
- ✓ Interact with 5x Groups
- ✓ **Connect with 10-15 new people (target market)**
- ✓ **Follow up with new connections**
- ✓ *Like / Comment on 5x connections updates*





Summary

1. **LinkedIn Marketing needs time to build momentum**
2. **Sort out profile first**
3. Decide what if any part this will play in marketing your services
4. Focus on planned core activities
5. **Block out your time each week and stick to it**

Essential legal business skills

Code of Conduct - Aspects of Social Media



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Social media

- Connecting with clients
- What does the Code of Conduct say about social media?
- So what are the rules?
- Lexcel requirements
- Getting it wrong..





Ring a bell?

“Been injured in a roller coaster crash?
We’re experts in personal Injury!!
#Smiler #Alton The
Towers”

Tweet originating from a staff member at a Yorkshire Law firm 3rd June 2105



Going Forward – wisdom is applying your knowledge!

- For a complimentary check on your LinkedIn profile following your implementation of the action(s) suggested by this webinar
- **Or** to discuss further in-house training for your legal team on this or other topics – please contact Ann Page – 07921540039
- For a compliance check of your Social Media policies – please contact Fiona Gillam for further details 07570793728