

One Page Business &
Marketing Planning Documents
for
Solo/Small Law Firms

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Introduction

In this package are several one-page templates which can be useful in setting your firm's goals, tracking its progress, and building your business.

They also will help you keep on top of things such as communicating with the clients, opposing counsel and the courts.

They can easily be replicated in Excel or Word so please feel free to modify them and make them your own.

Since, what works for one person may not work for someone else, use what you feel comfortable with and disregard what doesn't or isn't applicable.

What's most important is to develop a system, that's easy to use, malleable, and relevant. Without a business and marketing system it's impossible to grow your firm because you don't know where you've been or where you're going.

Once your systems are in place it's easier to create and design your firm the way you want it to be.

One Page Business Plan Template

Yearly/Quarterly Business Plan

[date]

[firm name]

Yearly/Quarterly Goal		
 [numerical goal] 		
3 Key Focus Areas		
1) [Key focus are to reach main goal] 2) [Key focus are to reach main goal] 3) [Key focus are to reach main goal]		
5 Objectives for Each Key Focus Area		
Key Focus Area 1	Key Focus Area 2	Key Focus Area 3
1. Objective For Area 1	1. Objective For Area 2	1. Objective For Area 3
2. Objective For Area 1	2. Objective For Area 2	2. Objective For Area 3
3. Objective For Area 1	3. Objective For Area 2	3. Objective For Area 3
4. Objective For Area 1	4. Objective For Area 2	4. Objective For Area 3
5. Objective For Area 1	5. Objective For Area 2	5. Objective For Area 3

Notes:

One Page Business Plan Instructions

Determine Your 1 Big Annual (Quarterly) Goal

Start by establishing a specific and measurable goal for your annual sales production next year. (quarter) Use objectives such as; total sales volume, gross income, number of units sold, or even net income. It is important that a main goal has a numeric value associated with it so that it can be broken down into monthly and weekly portions for measuring progress throughout the year.

Establish 3 Key Focus Areas to Reach the Main Goal

Establish 3 key focus areas that need attention over the following year or quarter. These focus areas should represent some of your more daunting tasks that will require a lot of work and help from others. They are the big tasks that are always looming in the back of your mind that never seem to get done. Examples might include creating a new website, setting up a client database contact system, hiring an administrative assistant, or developing a lead generation plan or system.

Plan 5 Objectives for Each Key Focus Area

Break down your key focus areas into 5 specific objectives that are in alignment with each focus area. Each objective should represent a specific action or task that can be completed. The key to developing effective objectives is to ensure that they effectively correlate to each key focus area. Otherwise you will just have a scattered to-do list that is unlikely to ever be completed since it is not focused on the accomplishment of your preset objectives.

Use the sample on the next page to create your own.

Yearly/Quarterly Business Plan

date: _____
 firm name: _____

Yearly/Quarterly Goal		
3 Key Focus Areas		
1. _____ 2. _____ 3. _____		
5 Objectives for Each Key Focus Area		
KFA1.	KFA2.	KFA3.
1.	1.	1.
2.	2.	2.
3.	3.	3.
4.	4.	4.
5.	5.	5.

Notes:

One Page SMART Goals Template

SMART GOALS

- * **S**pecific (simple, sensible, significant).
- * **M**easurable (meaningful, motivating).
- * **A**chievable (agreed, attainable).
- * **R**elevant (reasonable, realistic and resourced, results-based).
- * **T**ime bound (time-based, time limited, time/cost limited, timely, time-sensitive).

Template

SMART MARKETING GOALS 202_								
Month	Marketing Activity 1	Marketing Activity 2	Marketing Activity 3	Marketing Activity 4	Leads	Initial Meetings	Clients	Fees
January								
February								
March								
April								
May								
June								
July								
August								
September								
October								
November								
December								
Goals								
Total								

SMART GOALS TEMPLATE INSTRUCTIONS

This one-page worksheet is designed to make correlations between marketing activities and income.

It will also indicate if your conversion strategy is successful or needs to be modified.

How to use:

Fill in the marketing activities you plan to engage in this years. Fill those activities in along the top row. Examples include: 1x1 meetings, networking events, volunteer or group activities, newsletter, blog, or print publications, and ad purchases to name a handful.

Each month track those activities; over time patterns will begin to develop. Stick with what works and stop doing what doesn't.

Additionally, use this spreadsheet to determine your conversion strategy. In other words, how a client progresses from becoming a lead to a client. If something if there's a huge drop between lead to pc or from pc to client, your on-boarding system needs to be modified.

Use the sample on the next page to create your own.

SMART MARKETING GOALS 202_								
Month					Leads	Initial Meetings	Clients	Fees
January								
February								
March								
April								
May								
June								
July								
August								
September								
October								
November								
December								
Goals								
Total								

Notes:

Firm's 1-Page Marketing Plan

Before (Prospect)	 1. Firm's Target Market ----- ----- ----- ----- ----- ----- ----- ----- -----	 2. Firm's Message To My Target Market ----- ----- ----- ----- ----- ----- ----- ----- -----	 3. The Media Firm Will Use To Reach It's Target Market ----- ----- ----- ----- ----- ----- ----- ----- -----	
	During (Lead)	 4. Firm's Lead Capture System ----- ----- ----- ----- ----- ----- ----- ----- -----	 5. Firm's Lead Nurturing System ----- ----- ----- ----- ----- ----- ----- ----- -----	 6. Firm's Sales Conversion Strategy ----- ----- ----- ----- ----- ----- ----- ----- -----
		After (Customer)	 7. How Firm Delivers A World Class Experience ----- ----- ----- ----- ----- ----- ----- ----- -----	 8. How Firm Increases Clients Lifetime Value ----- ----- ----- ----- ----- ----- ----- ----- -----

1 Page Marketing Plan for Lawyers in a Nutshell

This one-pager is the creation of author/entrepreneur Allan Dibs. I've modified the template slightly for law firms. The original template can be found at: www.1pmp.com. If you like using this template I suggest you acquire a copy of his book *The 1-Page Marketing Plan*. It is an invaluable resource.

In A Nutshell

Allan Dibs' book, *The 1-Page Marketing Plan* is directed towards a general small business audience. The philosophy behind the book and marketing plan is to develop a method of **farming leads** instead of hunting them.

Below I've condensed and described each of the nine steps in the marketing plan, and made them law firm user-friendly.

The first three steps apply to the prospecting process, the second three apply to the onboarding process, and the last three steps are the client process.

Prospecting:

Step 1: Firm's Target Market

Who is the firm's ideal client? This should be more than just about client matters. The law firm should envision who the firm's ideal client really is. For example; what do they look like; what level of education do they have; where do they work; what do they do for pleasure? Create a list that describes the person. These are just some of the questions your firm needs to ask itself. The more specific you can be about this individual the better. Next, imagine and create a vision of your ideal client and if possible create a male and female version of this client. This individual is now your avatar or icon, and your target market. You are now ready to fill in the first box.

Step 2: Firm's Message

What is the firm's message to it's target market? Having your target market in mind, what do you want to say to convey to them so they'll engage you as a client. Your message should address their wants, needs, or desires, and should be memorable, and in the form of a headline. This will be your marketing campaign's message.

Step 3: Media

What media will the firm use to convey it's message to it's target market? Examples include: Newsletters, print publications, ad words, website, handwritten notes, swag, social media (which ones?), presentations, podcasts, webcasts, video, *et al.*

Leads:

We only do business with people we know, like and trust.

Step 4: Lead Capture

What methods does the firm use to convert an initial interested contact to a qualified lead or prospect? Examples include: free or reduced free phone or in person consultations, client friendly intake forms or other firm generated printed or Internet generated material such as an e-book or booklet. (Know and Like phase)

This step should be an initial gathering information process as well as an opportunity to grow and nurture a relationship.

Step 5: Lead Nurture

How will the firm convert prospects to clients? What methods will firm use to keep firm's name top of mind? Examples include: Newsletters, Blogs, Swag, Printed Material, Cards, Letters or news briefs. (Trust phase)

Step 6: Conversion System

How does the firm convert a prospect to a client? Examples include: Flat fees, bundled and un-bundled packages, subscriptions.

I do not recommend reduced fees as a conversion strategy. For various reasons, when client's fees are reduced, client satisfaction is reduced as well.

Step 7: Client Experience

What does your firm do to provide a memorable experience? Does your firm go above and beyond? Examples: promptness, communication, understanding, empathy

Step 8: Client Lifetime Value

How does your firm increase the monetary value of each client? This is really just a matter of issue spotting. Sell them what they want and give them what they need.

Step 9: Referral's From Clients

How does the firm get new clients from old clients or have previous clients rehire the firm?

Examples: Google reviews, ask, newsletters, holiday/birthday cards, legal news briefs pertaining to their issue, swag, thank you gifts for referrals.

Rules of Ethics Pro-Tips:

Colorado Rules of Professional Conduct

RPC 7.1 Communications about Your Services

- Reasonable expectation of prospective clients.
- Communications must be truthful.
- No “cut-rate”, “lowest”, “cheap”.
- Avoid “no recovery, no fee”; must disclose costs.
- Avoid comparisons with other law firms.
- Avoid misleading PCs to thinking what happened in one case will happen in theirs.

RPC 7.2 Advertising

- A lawyer shall not give **anything** of value to a person for recommending the lawyer's services except:
 - pay the reasonable costs of communications.
 - pay the usual charges of a not-for-profit lawyer referral service or legal service organization.
- Reciprocal referral agreements are only valid if:
 - the agreement is non-exclusive and,
 - the client is informed of the existence and nature of the agreement.

RPC 7.3 Direct Contact with Prospective Clients

- Do **NOT** solicit someone directly.
- Solicitations to the general public OK.
- Include “Advertising Material” in advertisements.
- Direct personal solicitations are OK, if the person is a family member, has close personal relationship, prior professional relationship or a lawyer.

RPC Rule 7.4. Communication of Fields of Practice

- Stating your areas or practice is OK,
- Can state, “specialist,” practices a “specialty” or “specializes in”.
 - Can NOT say your a “Certified Specialist” unless:
 - Approved by ABA or a state approved organization, AND
 - name of the certifying organization is clearly identified in the communication.
 - “Patent Attorney” and “Admiralty” is permitted.

One-Page Monthly Marketing Plan Instructions

The one page marketing plan is based upon relationship marketing, and the idea we only do business with people we know, like and trust.

Your goal should be to meet with 12 individuals a month. A meeting need not be an hour long and at a coffee shop, however it should be in depth and long enough to get beyond discussing the weather. It can be as little as 20 minutes and as long as a couple of hours.

If you feel comfortable sending a thank you note for the individuals time, then it qualifies as a meeting.

The goal of meeting all these individuals is to create as many ultimate fans as you can. An ultimate fan is someone who actively markets for you, and consistently sends you quality clients.

Notes:

Monthly Marketing Plan

Month: _____ Name: _____

Marketing Discipline to Focus on this Month: _____

Marketing Tool to Focus on this Month: _____

Relationships to Develop:

Date	Referral Contact	Type	Objective	TY Sent	Result	Notes/ Follow Up
	1.					
	2.					
	3.					
	4.					
	5.					
	6.					
	7.					
	8.					
	9.					
	10.					
	11.					
	12.					

Key

Objectives

BMR	Build More Rapport
CU	Catch Up
WT	Work Together
AFR	Ask For Referrals
TY	Say Thanks

Fan Types

D	Dormant
C	Casual
E	Engaged
S	Super
U	Ultimate

Jerry Maguire Calendar

Use this calendar to set and track your daily, weekly, and monthly monetary goals, as well as to establish a healthy work-life balance.

Formula to Use:

X = Amount you can realistically earn this year.

$X/220$ = your daily goal.

The number 220 is derived from the following.

365 days a year
minus
104 days for weekends
minus
11 days for federal holidays
minus
30 days for six weeks vacation.

Multiply it by 5 for your weekly goal and however many work days for your monthly goal.

Share this goal with partners, staff, family and even your dog!
Celebrate each and every time you reach your daily, weekly, and monthly goal!

Example: $100,000/220 = \$455$ a daily goal, $\$2,275$ a week, or $\$9,100$ for the month.

This calendar is useful in closing not only large accounts but small ones as well.

123calendars.com has templates to download, or use any calendar.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		<u>Notes:</u>				

Printable Calendars From **123Calendars.Com**

Daily Tracker

On the next page is a sheet that will help you track your daily activities, and set goals for them.

Below is a brief explanation for each section of the sheet.

Hourly timeline: Make it a habit to track your day into two parts. Client matters which earn your firm money, and everything else. The objective of this exercise is to prioritize, and track where you spend your time, align it with your daily monetary goal, and create a balance between accumulating income, working on your law practice (administrative and marketing), as well as enjoying life.

Hourly/Benchmark Goal: This is the amount of billable hours or benchmarks you set as the firm's daily goal.

Thank-You's: You should make it a habit to say thank you to at least one individual daily, or five a week. This could be by phone call, email or handwritten note. Make it a habit to thank everyone who sends you a lead.

Ask for Referrals: Get into the habit of asking for referrals; you should ask for at least one a day.

Daily Communications: This block is has four parts: Clients/PCs, Appointments, Attorneys and Referral Partners. Make it a goal to communicate with each one section of the block at least once. This block is designed to keep you in communication with clients and opposing counsel, as well as to develop more marketing relationships.

Must Do's: These are minor items you must do everyday, such as answer email, return calls, and other matters that have to be attended to before the end of the business day.

Can Do's: These are usually longer or ongoing projects that can be broken up into 15 or 20 minute increments. These should be the first items that can be delegated.

Gotta Do's: This short list are the things that must be accomplished today. Place the most pressing or challenging ones, at the top and do those first. Add them to your timeline!

The last thing you do each day should be to complete tomorrow's daily tracker. Check it off when it's done.

Daily Activities Planner

Name: _____

Date: _____

Hourly/Benchmark Goal	
Goal	
Actual	

My Daily Thank You's	

My Ask for Referrals	

My Daily Communications		
	Goal	Actual
Clients/PC's		
Appointments		
Attorneys		
Referral Partners		

	\$\$ Client Matters	Non \$\$ Matters
6am		
7am		
8am		
9am		
10am		
11am		
12pm		
1pm		
2pm		
3pm		
4pm		
5pm		
6pm		
7pm		
8pm		

Tomorrow's Agenda: _____

Daily Must Do's	Daily Can Do's

4-7 Most Gotta Do's to Complete