

MARKETING AND BUSINESS DEVELOPMENT WORKSHEETS

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ASSESSING YOUR LAW FIRM'S COMPETITION WORKSHEET

1. Who are your competitors?

- List all the lawyers or law firms in your locale offering the same services to the same niche target market:
- List the most well-known of those competitors:

2. What are your competitors' marketing strategies?

- List all of the marketing strategies used by these competitors:
- List the most successful of those strategies:
- List the least successful of those strategies:

3. What opportunities are your competitors missing?

- List the services you offer that your competition does not:
- List the services where you exceed the services of your competition:

4. What opportunities am I missing?

- List any additional information that you need to learn about your competition:
- List potential reasons that your target market would choose the competition:
- List ways that you can better reach your target market:

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CHOOSING A NICHE TARGET MARKET WORKSHEET

1. Find your sweet spot: the intersection of your interests, skills/experience, and needs in the market. Where do your passions and abilities intersect with a need (e.g., estate planning lawyer for young soccer parents, tax lawyer for new fitness center owners, business lawyer for new churches)?

- My personal and/or professional interests or passions are:
- My legal skills/experience are:
- These intersect with a need at:

2. Identify your ideal client/customer. Think about your best current or ideal client—those whom you like to work with, doing work you like. What are their characteristics? (Consider the following: legal form, geography, size, service, age, occupation, marital status, position, growth stage, lifestyle, financial status, industry, product, service, occupation.)

- My best current or ideal client is:
- That ideal client has the following characteristics:

3. Identify your best current revenue generator.

- The most lucrative kind of client for me currently is:
- The clients I really want to replicate are:

4. Narrow your focus and then narrow it again. Identify commonalities among your current clients. Narrow this again to have an even more focused niche market (e.g., “client is seeking a divorce” narrowed to “client is seeking a divorce and it involves custody issues” narrowed to “client is a father with custody issues within a divorce”).

- Some of my current clients have the following commonalities:
- A subset within this group of clients have the following commonalities:
- A further subset within this narrower group is:

5. Narrow your interests and then narrow them again, if you are new to the practice of law. For example, an interest in business litigation is narrowed to litigation on purchase agreements. That becomes narrowed to litigation over purchase agreements in the medical profession. Completing the double narrowing process tells you what market segment you need to be an expert in, so you can focus and organize your marketing.

- I am interested in working in the following practice area:
- I am interested in a subset within this area involving:
- I am interested in the following market segment involving the above:

6. Evaluate your knowledge and experience in a specific industry.

- I already have knowledge of the following industry(ies):
- I already have experience in the following industry(ies):

7. Reflect on your own characteristics. Think about your own demographics. Identify a common denominator such as language skills, unique education, cultural ties, age, life experience, etc.

- People similar to me who are most likely to hire me are:
- I have knowledge of or a pull for the following special population:

8. Identify a geographic niche. What geographic parameters might help you define a niche? Consider cities, counties, regions, states.

- The following nearby locations are underserved:
- I can offer my services in the following locales:

9. Research future trends.

- New and emerging areas of legal practice I have read or heard about are:
- I see the following changes on the horizon in my practice area, my areas of interest, or in my community:

10. Consider serving the tough to serve. Doing the work that others are unwilling to do may help you find your niche.

- Difficult types of clients that other lawyers are not pursuing include:
- Difficult issues that other lawyers are not addressing:
- Difficult practice areas that other lawyers are ignoring:

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CRAFTING AN ELEVATOR SPEECH WORKSHEET

First, answer the following questions:

1. What benefits do you provide for your clients?
2. What do you do in your practice that is unique?
3. What do you like most about what you do for your clients?
4. Why did you choose your clientele/your practice area?
5. What do you want your audience to know about you?

Next, write your 20-second introduction. Choose a format. For example:

- Experienced lawyers:
 - Hi, I'm **[insert your name]**. I work with **[insert ideal client profile]** who have/face **[insert client challenges]** and would like to **[insert results]**.
 - Hi, I'm **[insert your name]**. I am a **[insert practice area]** lawyer. I help/work with **[description of clients/target clients]** to get **[benefits of what you do for them]**.
- New lawyers:
 - Hi, I'm **[insert your name]**. I like to help **[insert desired client]** with **[insert legal challenge]**, by focusing on **[benefit of what you do for them]**.
 - Hi, I'm **[insert your name]**. I'm an estate planning lawyer focusing on helping young families get more sleep at night, by giving them peace of mind that they've made some plans.

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LAW PRACTICE MARKETING BUDGET WORKSHEET

Logo design and/or letterhead design	\$
Letterhead, envelopes, note cards	\$
Business cards (design and printing)	\$
Website hosting	\$
Website design	\$
Professional photograph (headshot and ¾ shot)	\$
Memberships in bar, trade, and/or other associations related to my target market	\$
Business development lunches	\$
Networking events	\$
Sponsorships	\$
Advertising	\$
Donations to target market or referral source related causes	\$
Holiday cards, other cards, postage	\$
Client and/or referral source thank you gifts	\$
Continuing legal education	\$
Business development coaching	\$
Other	\$
TOTAL	\$

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LAW PRACTICE TARGET MARKET CONTACTS WORKSHEET

Existing Target Market Contacts

Current clients	
Former clients	
Friends	
Relatives	
Neighbors	
Business associates	
Church members	
Former colleagues	
Classmates	
Trade associations/ industry groups	
Noncompeting attorneys	
Other service providers to the same market	
Alumni associations	
Nonprofit organizations	
School boards	
Other	

Potential Contacts in Target Market

[illegible]

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