



How to Build and Scale a Modern Law Firm

June 10, 2019

9:00 a.m. – 11:00 a.m.

**Connecticut Convention Center
Hartford, CT**

CT Bar Institute Inc.

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Seminar Materials Sponsored by



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Lawyers' Principles of Professionalism

As a lawyer I must strive to make our system of justice work fairly and efficiently. In order to carry out that responsibility, not only will I comply with the letter and spirit of the disciplinary standards applicable to all lawyers, but I will also conduct myself in accordance with the following Principles of Professionalism when dealing with my client, opposing parties, their counsel, the courts and the general public.

Civility and courtesy are the hallmarks of professionalism and should not be equated with weakness;

I will endeavor to be courteous and civil, both in oral and in written communications;

I will not knowingly make statements of fact or of law that are untrue;

I will agree to reasonable requests for extensions of time or for waiver of procedural formalities when the legitimate interests of my client will not be adversely affected;

I will refrain from causing unreasonable delays;

I will endeavor to consult with opposing counsel before scheduling depositions and meetings and before rescheduling hearings, and I will cooperate with opposing counsel when scheduling changes are requested;

When scheduled hearings or depositions have to be canceled, I will notify opposing counsel, and if appropriate, the court (or other tribunal) as early as possible;

Before dates for hearings or trials are set, or if that is not feasible, immediately after such dates have been set, I will attempt to verify the availability of key participants and witnesses so that I can promptly notify the court (or other tribunal) and opposing counsel of any likely problem in that regard;

I will refrain from utilizing litigation or any other course of conduct to harass the opposing party;

I will refrain from engaging in excessive and abusive discovery, and I will comply with all reasonable discovery requests;

In depositions and other proceedings, and in negotiations, I will conduct myself with dignity, avoid making groundless objections and refrain from engaging in acts of rudeness or disrespect;

I will not serve motions and pleadings on the other party or counsel at such time or in such manner as will unfairly limit the other party's opportunity to respond;

In business transactions I will not quarrel over matters of form or style, but will concentrate on matters of substance and content;

I will be a vigorous and zealous advocate on behalf of my client, while recognizing, as an officer of the court, that excessive zeal may be detrimental to my client's interests as well as to the proper functioning of our system of justice;

While I must consider my client's decision concerning the objectives of the representation, I nevertheless will counsel my client that a willingness to initiate or engage in settlement discussions is consistent with zealous and effective representation;

Where consistent with my client's interests, I will communicate with opposing counsel in an effort to avoid litigation and to resolve litigation that has actually commenced;

I will withdraw voluntarily claims or defense when it becomes apparent that they do not have merit or are superfluous;

I will not file frivolous motions;

I will make every effort to agree with other counsel, as early as possible, on a voluntary exchange of information and on a plan for discovery;

I will attempt to resolve, by agreement, my objections to matters contained in my opponent's pleadings and discovery requests;

In civil matters, I will stipulate to facts as to which there is no genuine dispute;

I will endeavor to be punctual in attending court hearings, conferences, meetings and depositions;

I will at all times be candid with the court and its personnel;

I will remember that, in addition to commitment to my client's cause, my responsibilities as a lawyer include a devotion to the public good;

I will endeavor to keep myself current in the areas in which I practice and when necessary, will associate with, or refer my client to, counsel knowledgeable in another field of practice;

I will be mindful of the fact that, as a member of a self-regulating profession, it is incumbent on me to report violations by fellow lawyers as required by the Rules of Professional Conduct;

I will be mindful of the need to protect the image of the legal profession in the eyes of the public and will be so guided when considering methods and content of advertising;

I will be mindful that the law is a learned profession and that among its desirable goals are devotion to public service, improvement of administration of justice, and the contribution of uncompensated time and civic influence on behalf of those persons who cannot afford adequate legal assistance;

I will endeavor to ensure that all persons, regardless of race, age, gender, disability, national origin, religion, sexual orientation, color, or creed receive fair and equal treatment under the law, and will always conduct myself in such a way as to promote equality and justice for all.

It is understood that nothing in these Principles shall be deemed to supersede, supplement or in any way amend the Rules of Professional Conduct, alter existing standards of conduct against which lawyer conduct might be judged or become a basis for the imposition of civil liability of any kind.

--Adopted by the Connecticut Bar Association House of Delegates on June 6, 1994

Faculty Biographies

Ryan McKeen is a personal injury lawyer at Connecticut Trial Firm, LLC and co-author of the upcoming book *Tiger Tactics: Powerful Strategies for Winning Law Firms*.

Attorney **Jay Ruane** began his career as a public defender in 1998. He did so after completing his bachelor's degree at the University of Scranton (1994), and his law degree at the University of Connecticut School of Law (1998). After two years working in public defense, he decided to go out on his own, and began a private law firm with his father, Attorney Jim Ruane. In 2001, Ruane Attorneys was founded, and it has since become the largest criminal defense law firm in the state of Connecticut.

Jay is a founding member of the DUI Defense Lawyers Association, and served as President of the Connecticut Criminal Lawyers' Association in 2015-2016. He has also written several books on divorce as well as criminal defense, including "A Divorce Lawyer's Guide to the Connecticut Criminal Process". Jay is a frequent speaker at criminal defense seminars and conferences.

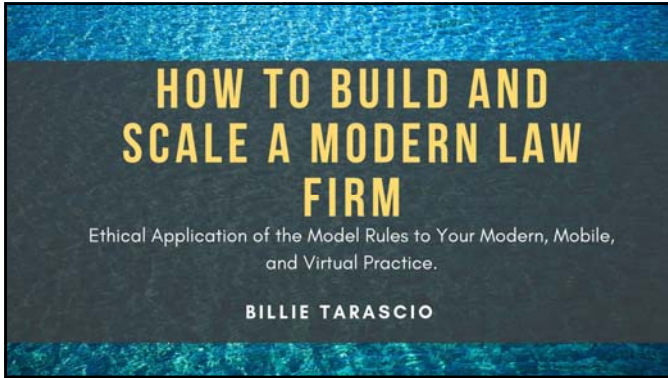
Attorney Ruane has been working with criminal defense cases for the past twenty years. His experience with domestic violence cases, restraining orders, and more bring a unique perspective to criminal defense and divorce.

Billie Tarascio attended University of San Diego Law School and the University of Oregon School of Law, graduating in 2005. She worked at several firms in Eugene including the Department of Justice, Family Law Division, the non-profit A Family for Every Child and clerked at the Lane County Juvenile Court under Justice Kip Leonard. Her legal focus is on education law, including special education within schools, family law, adoption and mediation. Billie is a skilled practitioner, national speaker, law firm business consultant and a Martindale-Hubbel honored attorney. She was granted the prestigious "Client Distinction" award based on her Communications Ability, Responsiveness, Quality of Service, and Value for Money. Fewer than 4% of attorneys nationwide have been accorded this honor of distinction.

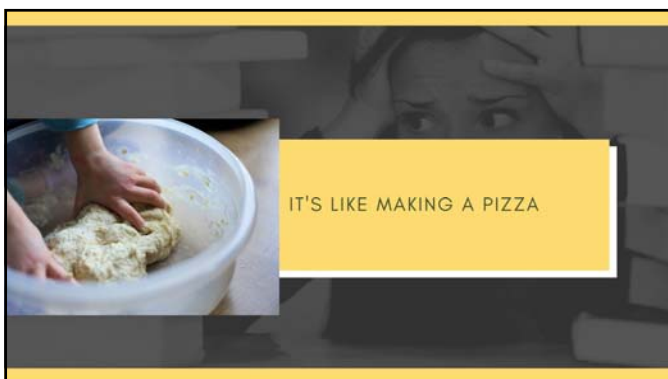
How to Build and Scale a Modern Law Firm (CLC2019-A07)

Agenda

- 9:00 – 9:45 a.m. Speaker: **Billie Tarascio**, Modern Law
1. Competence, ethics, and the need to adapt your practice
 2. Discovering your path and your reality through soul searching data
 3. Hiring and management for internal or external support
 4. Process, technology, and automation
 5. Attracting, acquiring, and maintaining the right types of clients
- 9:45 – 10:30 a.m. Speaker: **Jay Ruane**, The Lawyers Guide to Paid Social Advertising
1. Lawyer Marketing: The New Paradigm
 2. Me or My Firm?
 3. A Funnel Approach
 4. Define Your Targets & Audiences
 5. Picking the Right Type of Campaign
 6. Creative Development
 7. Pro Tip
- 10:30 – 11:00 a.m. Moderator: **Ryan McKeen**, Speakers: **Billie Tarascio** and **Jay Ruane**
- Moderated Panel Discussion










DOUGH = VALUES AND DATA
SAUCE = PEOPLE
CHEESE = GETTING CLIENTS
TOPPINGS = PROCESS AND TECH
BASIL, WINE = PUTTING IT ALL TOGETHER



YOUR BASE VALUES=
VISION, VALUES & CULTURE

we had never taken the time to figure out who we were and what our values were.



RETHINKING VISION, VALUES & CULTURE

Take the time to do the work



WE REWROTE OUR VVC AFTER MAJOR RECONSIDERATION

WHOLE HEALTH

we serve our clients and staff in a way that keeps their whole health in mind


GROWTH

we are hungry for growth and improvement in all things

CREATIVITY, OPTIMISM, BRAVERY & EMPATHY

we embrace these qualities as the best fit for our firm


WHOLE HEALTH



WHAT THAT MEANS FOR CLIENTS

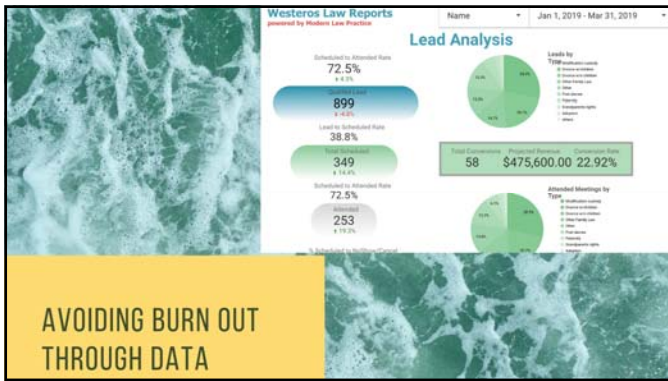
"We serve our clients with long-term benefits and whole health in mind. We will communicate in the way that best suits the client. For some this is phone, others prefer email and some prefer in-person meetings. We will look for the best solution for you. For some this means going around the legal process and not through it."

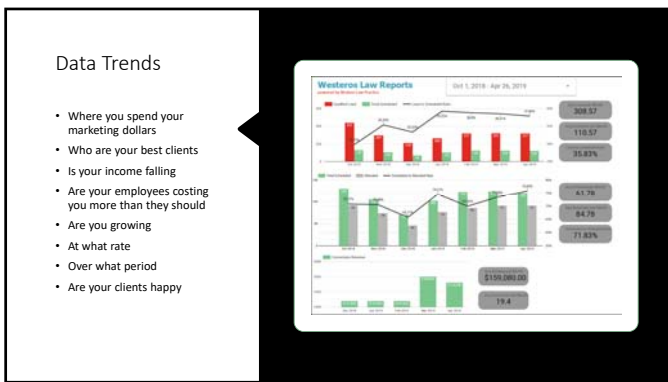
WHOLE HEALTH

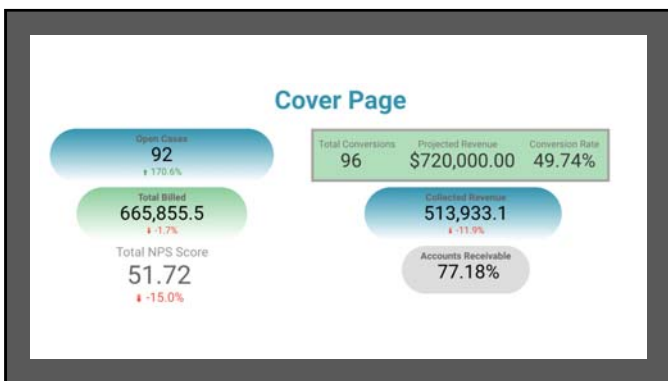


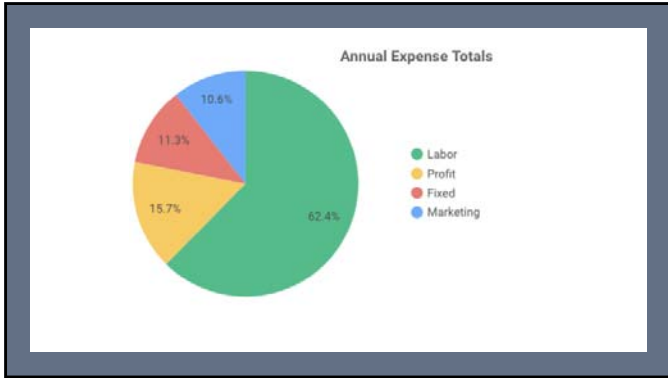
WHAT THAT MEANS FOR OPERATIONS

"Internally each person has their own preferences, styles, limitations, and strengths, and we have ultimate flexibility and personal accountability to our clients and the rest of the team. We offer unlimited paid time off and a mobile work environment. We invest in physical, emotional, and spiritual health, not just CLEs. We understand that people may work untraditional hours or have nontraditional work habits."





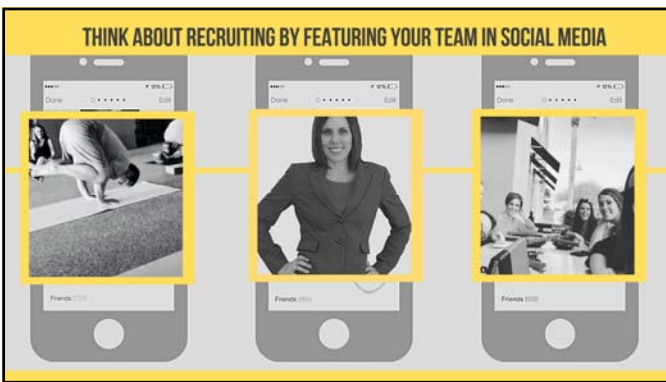






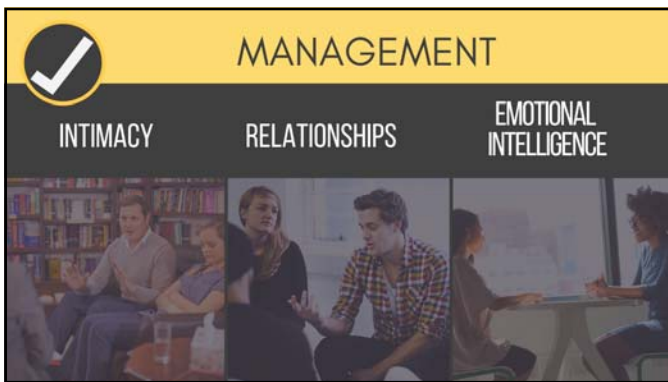














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MARKETING

WHAT DO CLIENTS CONSIDER MATERIAL?

What do they value?

- Experience
- Training/Education
- Wins
- Legal Knowledge
- Cost

What about a different perspective?

Did you really listen to what they tell you?

WHAT THEY SAID

“



Our case has been a long road of emotional ups and downs. It has changed hands and changed states. For the past 7 years of our situation, Billie has **always informed us** of any updates or requirements immediately since she has taken over. She has **never left us wondering what to do next**, or waiting on her responses. She is extremely professional and yet takes every aspect as what impact from a friends point of view. **Feeling like you have a friend** to help you through these trials of what life can throw at you, can mean more than words can explain. We have had things thrown at us that was not in our control, and Billie has **guided us** through them. The whole team at Modern Law should be acknowledged for their efforts in every way!!

WHAT THEY SAID

“

I was referred to Billie by a close, personal friend of mine who also practices law, and who spoke very highly of her. I walked away from my first appointment with Billie with a **sense of relief** knowing I would be represented extremely well. Secondly, she really **seemed to understand where I was at emotionally** and was **supportive and encouraging** in a way I would expect from my counselor. She's tough, yet sweet. I would definitely not want her to be my opposing counsel. I have referred her now to two of my close friends and I will continue to carry her business card in my wallet for the next one.



WHAT THEY SAID

“

I truly enjoyed working with Billie. While divorce and the proceedings going along with it are unfamiliar territory and very uncomfortable - Billie made it so much easier. Her and the entire Modern Law Team were very professional, timely and helpful for anything and everything I ever needed. She was **timely in responses** (never more than a couple of hours for anything), **answered all of my questions**, which I had a lot of, and thorough with my case. And when we had to go to court and to mediation she **made me feel comfortable, prepared, knowledgeable** and ahead of the game. She's also **fun to work with** and makes a miserable situation much less so. I'll highly recommend friends, family and colleagues to Billie or anyone at her firm.

**CHANGE YOUR MINDSET
AND GET THE HACK**
MAKE THEIR IDEAS YOUR TOOL

- 1 STUDY WHAT YOUR CLIENTS VALUE IN THEIR COMMENTS — AND THAT IS YOUR MARKETING MESSAGE.
- 2 INCORPORATE THAT IDEA INTO EVERY SINGLE COMMUNICATION, POLICY AND PHILOSOPHY.
- 3 ALIGN THE OBJECTIVES OF THE CLIENT AND ATTORNEY TO ALLEVIATE CONFLICT AND AVOID COMPLAINTS.

DO YOU NEED MORE CLIENTS? FIX INTAKE

INTAKE Have systems for following up and keeping people engaged
Take away unnecessary forms, steps or questions

THEN SCHEDULE THE CONSULTATION

THE PROCESS

- Greeting
- Active Listening
- Closing
- Plain language fee agreement

WHY IS INTAKE SO IMPORTANT?



Some of the most powerful and predictive indicators take place during the sales process/section of the client journey

HERE'S WHAT WE TRACK

- Sales Leads
- Leads scheduled
- Attended
- Conversion
- New clients monthly
- Average client spend
- Monthly revenue




PRO TIP:
A SLIGHT CHANGE TO ANY OF THESE ELEMENTS CAN LEAD TO MASSIVE CHANGES IN YOUR RESULTS!

SET YOUR BASELINE



Baseline: 150 leads, 50 scheduled
Baseline: 30 ICs per month
Baseline: Conversion of consults to clients is 50% (15 new clients)
Client average spend is \$6,500
Baseline monthly revenue \$97,500

TWEAKED IT



Baseline: 150 leads, ~~50~~ ^{65 scheduled} scheduled
Baseline: ~~30~~ ^{45 consults} ICs per month
Baseline: Conversion of consults to clients is 50% (~~15~~ ^{22 clients} new clients)
Client average spend is \$6,500
~~Baseline monthly revenue \$97,500~~
Baseline monthly revenue \$146,250

WHY TRAINING MATTERS



Baseline: 100 leads, 65 scheduled
Baseline: 45 ICs per month
Baseline: Conversion of consults to clients is 50% (~~22~~ ^{40% 18 new clients} new clients)
Client average spend is \$6,500
~~Baseline monthly revenue \$146,250~~
Baseline monthly revenue \$117,000

BUT WAIT, THERE'S MORE...




WE DID A WORKSHOP INTERNALLY
WITH ROLE PLAYING AND WE
CHANGED OUR CONVERSIONS OF
CONSULTS TO CLIENTS 76%!!!

WHY TRAINING MATTERS



Baseline: 150 leads, 65 scheduled
Baseline: 45 ICs per month
Baseline: Conversion of consults to clients is ~~50%~~ **76%** (~~22.5~~ **34 new clients**)
Client average spend is \$6,500
Baseline monthly revenue \$146,250
Baseline monthly revenue \$221,000

NUMBERS GIVE YOU THE
INTEL TO GROW AND
MAKE MORE \$\$\$



TAKEAWAYS

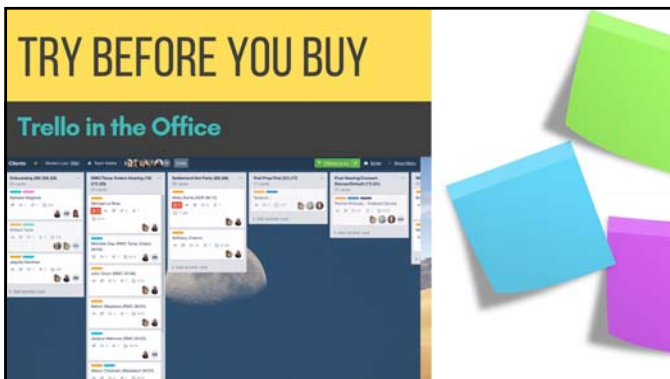
If you don't know these
numbers you won't know
when you need to hire


And...

Hiring another attorney allows
you to predict growth



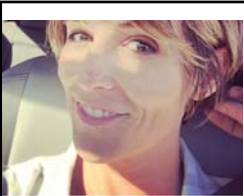







YOU DID IT! THE PERFECT PIZZA

**TO EXECUTE THIS, YOU NEED A
PLAN, STRUCTURE, AND SUPPORT**



Let's Talk!



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The foundation of your firm may not what you think it is.

Read on for a peaceful, predictable, and fun way to practice.

Every quarter, our firm gathers for a retreat where we talk about what's working and not working in the organization. We identify opportunities, tackle issues and obstacles, and assign people within the organization to champion an issue and solve it within the following three months. At our last retreat, the primary issue discussed was front desk coverage and greeting clients when the receptionist calls out sick. That was our biggest issue. We are on track to grow another 20% this year as we have year over year for the last ten years. We are not without our problems, but we have peace, predictability and a lot of fun. We know when we are off track and we know how to correct the problem. There is a formula you can follow to achieve this type of law firm. Yours will be different from mine, but it will give you the control over your firm that most attorneys struggle to achieve. It isn't magic and it takes hard work and diligence, but you can do it. Attorneys are great at following directions.

And herein lies the crux of the problem. There is no workable business model for attorneys to follow. The model that was developed by our predecessors has been steadily declining for decades. As the internet transformed the way we do business, attorneys have largely been left behind to flounder on their own. The vast majority of lawyers are solos or part of small firms, siloed and left to figure out a workable business model while also trying to juggle a full case load and a personal life. It feels impossible, probably because it is.

I'm an attorney. But I have not had a full case load since starting Modern Law ten years ago. The vast majority of that time has been spent by me on the business, conducting experiments, testing and talking with other entrepreneurial attorneys across the country. There are some very well-run law firms across the country and with the increased communication from conferences and communities, we have come together to unveil the curtain and share real data. It works. We have peace, predictability, and fun doing what we do. All you need to do is follow the formula. Building your law firm is like building a pizza. You must start with a great crust. If pizza crust is terrible, the whole pizza is terrible and you will probably throw it away mid slice, or just feel disgusting after eating it. Your pizza crust is your values. This is your fundamental purpose of existing. This is defining and discovering deeply held values and beliefs and turning them into a constitution that will be followed at all times. No policy, person, or client can come into the firm or stay in the firm if they don't share your values or if they operate outside your constitution. Several years ago, I had an employee who did not share our values. He started out appearing as if he shared our values, but after six months or so, it was clear he did not. He was exceedingly negative. He was mentally and physically spent. Despite us paying for counseling and weekly Yoga he refused to take care of himself. He insisted on working excessively and raged against clients and co-workers. Our values include growth, whole health and optimism, empathy, and communication. We have written policies that make these actions not optional. I care as much about our work environment as I do our bottom line. He had to go.

For a year, I defined and described the crust as our constitution, but it was missing a critical component. Your crust is also reality. We can't build a firm solely on who we believe we are or who we want to be. To make real decisions we must know where we stand today. That is why

your crust- values, vision, and culture all summed up into a constitution- along with data is the foundation of a firm that provides control and predictability.

Sometimes our emotions and feelings fool us and even the most even keeled attorney will make a bad decision on feelings that may only be half-truth. I had a recent experience with this where I was having a bad week- maybe month. Our office had been plagued with an illness and half of the people had been out of the office and unavailable for work off and on. One attorney was out for weeks. In general, my firm had become less disciplined than I wanted it to be. These things are cyclical, we weren't in a crisis, but it was time to become more focused. I was out for a day and was very clear in my expectations that people were to leave the office early only if their work in terms of meeting billable requirements. The attorney who had been out most often didn't work. He billed .2 hours – all. day. I was livid. I was ready to fire him. It was a Friday and I spent the weekend fuming. Then I ran the data. I am very interested in knowing the profitability per employee. This is best understood in terms of a percentage. How much of what a time keeper bills and collects is being used to pay that person and how much is being used for the firm. I ran his number for the quarter. It wasn't bad. In fact, it was the exact same percentage as the employee who I viewed as my most productive team member. My feelings changed instantly.

No, it wasn't ok that he had been out as much as he had been. I needed to step up and provide a lot more guidance, management and leadership, but he didn't need to be fired. My emotion of frustration and anger was justified but that alone would have led to a bad decision. The attorney is back at work and doing an amazing job.

This is why the crust or foundation of your firm should be a combination of values and data. This is why we have spent months working with developers to create a dashboard that can be used in your firm. Data on its own is interesting but not actionable. Our dashboard integrates with your systems using Zapier and the API of software to display the data you need most to determine if you have enough clients, what your future revenue will be, if you have a leaky sales funnel, where is the leak? The dashboard also displays employee productivity, client satisfaction, and overall firm health.

The Business of Law is here for the taking. By following key principles related to each aspect of your business you can build a scalable firm that provide you with freedom, fun, and predictability.

We all know that law is a “service” business. We are not in retail, manufacturing, or agriculture, we are in the business of professional services.

Let's break this down: We are in the business of serving legal consumers. This is how we earn our living. Perhaps if you are an associate at a firm where you are handed work and expected to perform that work, you are in the business of practicing law. **But if you are working for yourself, you are not in the business of practicing law, you are in the business of serving legal consumers.**

If this is the starting point, then the first thing to really ponder are the perspectives, needs, wants, and desires of the legal consumer. By focusing on your customers, you can determine who you want to be your customer and which customers you do not want to work with.

Truly climbing into the brain of your consumers is an exercise that will yield great fruit and can influence all your decisions about how you operate, what and how you communicate, the delivery models and methods of your services etc. As an example, we are a technologically savvy firm. We communicate via email and text because that's what most clients want. It's efficient, fast, costs less, and gives us a great record of communications.

When we have a client who doesn't use email, we give them two options: we would be happy to set email up for them, *or they can find another lawyer*. We know ourselves and our ideal clients/consumers. We are not set up to mail out correspondence or minute entries. When opposing counsel insists we mail paper, my staff grumbles. It's inefficient and wasteful, and it costs clients money for something that doesn't benefit our case. Our customers want and deserve efficiency at every single step. Because we know that, we know that clients who want us to mail items are not the best fit.

Taking the example further, because we know our clients/customers, the decision to incorporate texting was a no-brainer for us. We make sure that they can reach us by text on the first communication – if they want to. If they have to take the time to call, that's more opportunity for the client to *not* take action because texting can happen almost anytime – in a coffee shop, a waiting room, a movie theatre – when a phone call needs privacy and more time.

Likewise, we can happily kill the fax machine, understanding that our clients do not fax. Most of all, they want access to lawyers and staff when they need information, not when we are available to get back to them. Obviously, this presents some challenges/opportunities, because we cannot be at each client's beck and call each day, but what if you added a Facebook page that allowed your clients to message you, setting up an instant response that lets them know you'll get back to them shortly.

That's a simple automated system to use that let's your clients know you're listening, even when you're too busy at that moment to get back to them.

Niche Marketing is the process of taking a large market (in this case legal consumers) and breaking it down into smaller groups with similar needs, characteristics, and demographics. Since none of our law firms serve all legal consumers, we must segment our services to those who want what we offer. In general, the more targeted you can be, the more successful your marketing and advertising efforts are likely to be. We know we need to be laser focused to compete in this competitive marketplace, but how?

Figuring out where and how-to market is at the crux of many of the decisions we are asked to make as law firm owners. There is no shortage of options. You can spend money on online directories, website design, pay per click, social media, networking, writing a book, the list is literally endless and there are vendors calling every day with "new opportunities in your area." Once you decide where you want to spend your advertising dollars, then you have to decide what to say. Do you change your message depending on where you are advertising?

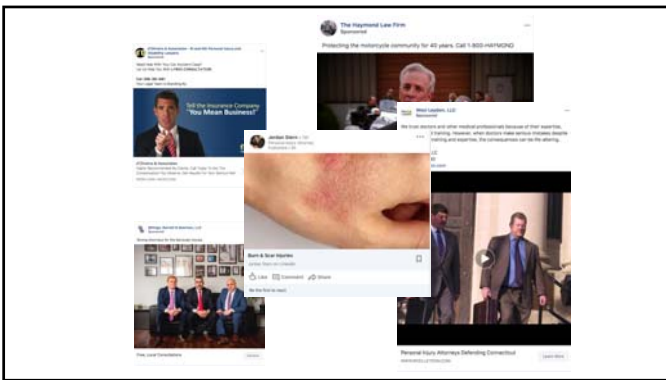
The first step in market segmentation or niche marketing is vision. Who are you? Who are you today and who do you want to be tomorrow, or in five years? What are you trying to accomplish with your company and as a lawyer? These questions are not easy. They take time and discovery. But the answers to these questions will make it so much easier to decide where to advertise and what to say. Once you discover who you are and what you are trying to accomplish on a broad level, you can write your law firm constitution, or define your vision and values. This exercise will help clarify your audience, your purpose and set your goals. Without taking the time for this step, you will do what most of us do, spend a little money in a lot of places and have no idea whether any of it is working.

Take your law firm constitution and tell your clients what you stand for and why you exist. Tell your clients who you like to work with, and more importantly, who you don't want to work with. It's remarkably effective to tell the wrong clients you don't want to work with them. We started telling people who wanted to burn their spouse and use the system to inflict pain not to hire us and we started attracting all the right clients. Clients who share your values will like you more, send more clients your way, and make your job easier and more fun.

When in doubt, ask your clients what they like and what they don't. If you are feeling stuck, check out your online reviews and read about what your clients have to say about you. What do they value? What do they like? If you use the same language of your best clients, you can attract similar clients. Ask your best clients how they chose you or found you. Study the demographics of your best clients. Start by identifying a list of the clients you enjoy working with. Cross reference that with how much revenue they generate. Find out where they live, shop, work, and play. How old are they? Do they have minor children? Consider making a mock ideal client and writing to that person.

Simon Sinek's best-selling book "Start with Why" explains that starting why instead of what or who is the best way to gather a tribe and attract people to you. I'm advocating the same approach. Figure out your why. Take ample time and energy to figure it out, define it and write it. It will become your foundation for marketing segmentation, hiring and more. The smaller your niche the more likely your success.













quotes
recommendations
milestones
holidays
evergreen content
hashtagged
giveaways
FAQ
interviews
jokes
Buzzfeed lists
links
mentions
mistakes
promotional posts
questions for them
reshare of social comments
thanks
resource lists
visual content (unbranded)
weekly themed posts
engage them - YOU questions

NICE



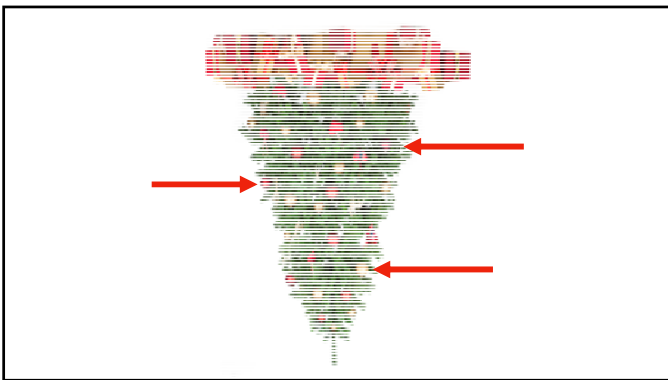


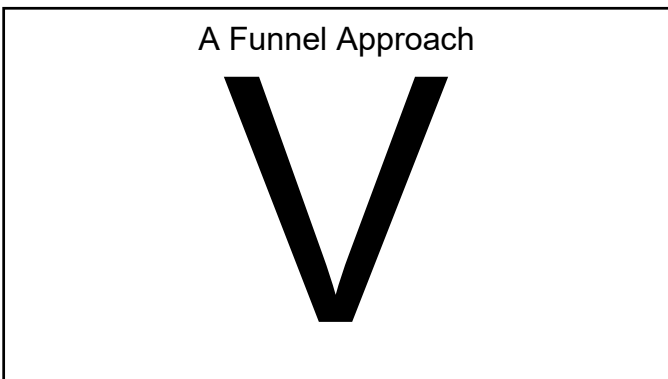
EGO



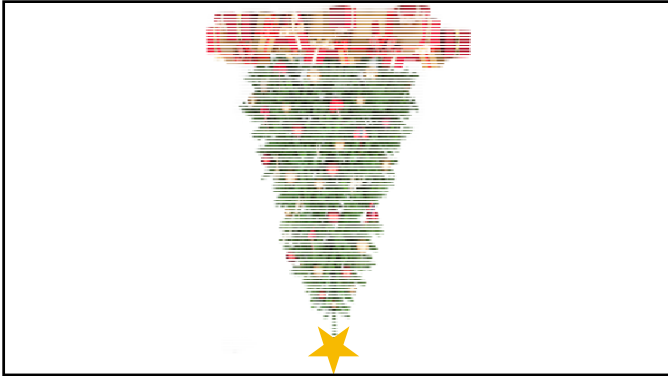


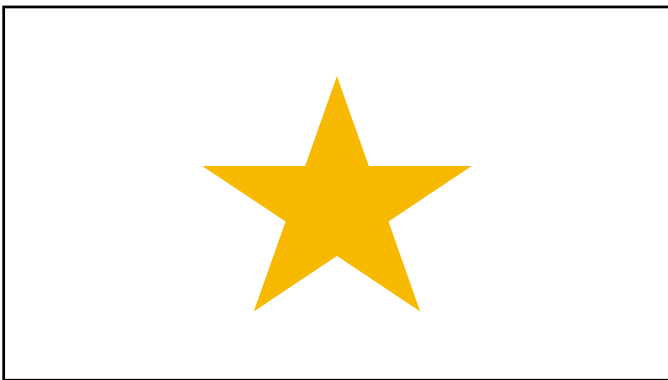






A Funnel Approach







reach me:

[linkedin.com/in/jayruane](https://www.linkedin.com/in/jayruane)

@jayruane

fb.me/jayruane



THE LAWYERS GUIDE TO PAID SOCIAL ADVERTISING

JAY RUANE

A low-angle, upward-looking photograph of several skyscrapers reaching towards a bright, hazy sky at sunset or sunrise. The sun is a large, glowing orb in the lower center, casting a warm orange and yellow light across the scene. A black street lamp with two circular fixtures is visible in the upper left corner. The buildings have a grid-like facade of windows and structural elements.

SOCIAL MEDIA IS... DIFFERENT

While the world flockes to social media, lawyers especially have found it a difficult medium from which to attract clients. This is due to a fundamental lack of understanding of the mechanics of advertising and the predatory “lawyer marketing” agencies and services who take money from law firms every day but fail to give lawyers an understanding of how digital marketing works in a modern world. or apply it for their clients.

This guide is the antidote for that.



LAWYER MARKETING: THE NEW PARADIGM

Lawyers have only been marketing for a few decades, and in that time, give 2 unique functions of our profession, we have put ourselves in a disadvantaged position when developing our marketing, especially online.

The first problem with lawyer advertising is the barrier to entry to becoming a lawyer and its impact on the lawyers perspective on business operations. Because the type of service our business provides, namely knowledge and the skill to apply that knowledge, and the cost to enter the profession in time, education, money and state licensing, fewer people can open a law firm than another type of business. Historically, it created an abundance of potential clients when compared to the number of attorneys in any community, and for a long time, reduced the type and even need for active marketing of a practice. Because of the abundance of clients, the knowledge a lawyer or firm had could be sold at above market rates capturing a satisfying income for the lawyer. The law schools, seeing themselves as the guardian of a profession and not a technical skill to be monetized, failed over generations of lawyers to impart any business sense to young attorneys.

The second problem with lawyer marketing is a fundamental misunderstanding of how marketing works with the general public by lawyers.

The first major type of lawyer advertising was Yellow Page advertising. This was excellent for the clients who needed a lawyer “right now.” They could turn to a page in the yellow pages, identify a lawyer who advertised their needed practice area. As the internet grew, websites replaced yellow pages ads, but did nothing to change the way lawyers advertised. The primary focus was to tout your skills, announce your accolades and expect people to hire you. Doing good work would yield clients.

Then the possibility of paid advertising on search engines pushed into the legal area, and law firms jumped on the bandwagon looking for those “ready to purchase” clients who were using a search engine instead of the yellow pages. Pay Per Click advertising took off and law firms spent increasingly more money chasing those prospects driving more revenue to the search engine companies.

While this was happening, a fundamental change happened in our client base. The revolution of the internet bridged the information gap and suddenly the potential clients started to find self directed solutions and could avoid the lawyer for some routine legal problems, effectively reducing or eliminating the “low hanging fruit” of easy repeated legal services from which to derive profit.

The rise of social networks, like Instagram, LinkedIn and Facebook brings a new dynamic to the marketing of services, and many lawyers want to place ads because they recognize that more people are spending time on social networks than in social clubs. Those lawyers fail to recognize that

a presence on a social media platform is MUCH different than targeting “ready to purchase” consumers who they have been targeting for 40+ years.

A new paradigm must be put in place to effectively derive revenue and clients from these social sources, otherwise lawyers will see more and more market share lost to the lawyers who effectively adapt to the new reality of online marketing.



Local Business or Place



Company, Organization or Institution

ME OR MY FIRM?

Even setting up your profile leads to much consternation. Facebook provides many different options for a person or brand to build a page that if may seem overwhelming to do so.

One of the first decisions you need to make is if the brand you are building is about YOU or YOUR FIRM

You see, there are major differences in marketing online and while the inclination would naturally be about building your firm, that may not be the best for your mission. You can build your business online as either a Local Business or Place. You would want to do this if:

If you have a 'bricks and mortar' office or want people to physically visit you, the Local Business or Place page is for **one for you.**

Features that a FB Business Place Page include:

Contact information, Trading hours, Price range, Parking options, Ability for people to 'check in', Allows reviews, Map listing

If you want to build a page for your Company, Organization or Institution, you have that option as well. This is for instances you have more than one location or foot traffic is not of major importance for your business, **this is the option for you.**

Features: Contact information, Mission, Awards, Products, Option to add the 'check in' ability after initial set up.

In addition to the features above, the list of business categories is different for each page type. As an example, Local Business Pages include categories such as Bars, Beauty salons, Retail shop etc. whereas Company Pages have categories such as Consulting/Business services.

This information is important because it helps fans find your business.

But is this the right category for you? There is one more you should consider:



A public figure category is perhaps the BEST choice for you. While it will never let a person

"check into" you, it enables you to come up in the Facebook feed as if you were just another "friend" of a person.

In these days with 10+ years of Facebook friend gathering, many people have long lists of friends they don't necessarily engage with much anymore. And if you position yourself as a public figure, you can sponsor posts and videos and it looks like you are just another "friend" in the feed. You take away the suspicions they have about being marketed to by businesses and position yourself as someone with their, not your, interest at heart.

People are not on Facebook to engage with businesses selling to them. They are there to talk to their friends and neighbors. By positioning yourself as just another friend, and then acting like a friend and sharing good information 90% of the time and only asking for the sale to the HOT prospects, you can get better results for less money. Remember - hard selling costs the most - in any industry!

For most lawyers, a "Public Figure" page is the right choice for a Facebook page.



A FUNNEL APPROACH

Mention the word “sales funnel” to almost any attorney and you will see their eyes glaze over. Simple marketing concepts, taught in Marketing 101 at a local community college, have no interest to the average attorney, yet understanding and applying those concepts can yield hundreds of thousands of dollars in legal work. It is only the ego of the lawyer who thinks they don’t need to understand or implement this process that stands in the way of success.

The crazy thing about a sales funnel is that lawyers have been using them for decades. Think of the general practice small town firm of the 1950’s.

They helped a young couple purchase their first house. After the house, they couple had a child. The couple needed a will. They drafted the will. Once that young child grew, perhaps they got in a little trouble, and handled the criminal court case for their juvenile misconduct. Fast forward a couple of years and the grandparents died. The lawyers handled the probate of the will. A few years later - divorce, and the law firm handled that. Maybe they established a trust.

All of these steps were a client journey through a law firm - perhaps utilizing different lawyers in the same firm, but nonetheless, they journeyed through their life's legal needs with a trusted resource.

And they went back to that law firm each time because they knew them, they trusted them, and they got good, quality work.

But in today's economy, families don't stay in the same town forever. People move. Legal needs change, and established relationships don't necessarily exist long term.

Couple that with an increasing focus on finding the exact solution for the exact problem has driven the law practice, despite an education in "all things law" to have more and more lawyers concentrate their practices on certain areas of the law.

This rise of legal concentrations is a boon for the client, because they get legal services from someone aware of the cutting edge in each particular niche. But it impacts the lawyer because they have less access to the client throughout the life's journey. This means the lawyer needs to focus more on client acquisition than previous generations of attorneys. A skill that is never taught in law school.

So in order to be effective in today's digital world, a lawyer must create the customer journey online, allowing people to slowly understand, appreciate, and come to the realization that they need those services so that a lawyer can build a client base to service. Of course, there will always be the clientele that needs immediate assistance. There will always be a market for next day criminal defense assistance or for someone to consult

with the man suddenly served with divorce papers. But more and more, the potential client doesn't know where to turn in their moment of need. If you can create a customer journey to educate them about your service, then when they need you they will seek you out because you and your services will be top of mind.

People struggle with all of the options available in social media advertising because so many options exist. Its not as simple as deciding between a full color or black and white yellow pages ad. So in order to properly apply Facebook or other social media advertising, you should map out your funnel strategy, much like a killer cross examination or written contract that covers everything. Each step in the process requires that you take some time to think out the necessary parts. Involve non lawyers in your office (who likely spend more time talking to potential and non clients than YOU do) because marketing, even lawyer marketing, is about connecting with people. Since 99% of your potential clients will NOT be other lawyers, you should try to avoid marketing in ways that might be impressive to other lawyers.

Here's a tip - unless you are actively marketing to other lawyers you should not be advertising your "AV" rating.

Non lawyers have no idea what that means! (if you don't think this is true, ask the next 10 non lawyers you meet to explain an AV rating to you.)



DEFINE YOUR TARGETS & AUDIENCES

Social media marketing provides almost unlimited targeting options. By utilizing the tools available you can target in combinations of gender, age, location, affinity groups and others. Its too easy to get sidetracked into trying to target everyone and everything. Before you do that, you need to think about your clients and who you want as clients.

Not only can you segment the audiences who see your message by factors, you should also be segmenting your audiences into 3 different categories: *Cold, Warm and Hot.*

Cold

A cold audience is someone who has never heard of you before. They are strangers to you. They are not predisposed to connect with you. These are people who have never been on your website and have had no reason to know you even exist. Cold audiences can be served wither topic specific items that are produced by other parties (I found this valuable, you might too) or general information that gives them an overview of a certain topic. For estate lawyers - think about something from AARP

that talks about the need for a power of attorney or living will. For real estate lawyers - maybe a checklist to consider when buying a house.

Warm

These are people who know you exist, but aren't very engaged with you. They may have been to your site, Facebook page, LinkedIn profile and watched a video you made or read a blog post, but they haven't given a signal that they are ready to engage your services yet. These people are digging deeper in the subject matter - and might be ready to give you their email address or watch a video you produce on topic. You are asking them for a larger commitment, and they feel comfortable since you have already given them value without demanding much in return.

Hot

This is the group you want to spend your biggest bucks and best material on. They know who you are, they might be on a mailing list or newsletter list and have been on your site and know what you do. These potential clients are primed for a deeper connection - FB lead ads which get you email/contact information, perhaps you invite them to an offline event or get them to schedule a free consultation.

Audiences

This book isn't the place to list the myriad of audience options available in paid social platforms. The combinations are infinite. What you need to do is identify groups of people who have previously been receptive to your marketing messages and identify unifying features that allow you to group them into unique cohorts.

In addition to using the platform to create groups, opportunities exist to identify 2 groups that can be arranged.

Pixelated Audiences

Facebook enables you to code a pixel on your website that puts all Facebook visitors who have been on your website, or certain pages of your website into a cohort. *This is an ideal grouping to both include in warm campaigns and exclude from cold campaigns.* For example, a campaign for cold visitors should naturally exclude people who have been on your website in the last 60-120 days, since they already know you and can't be classified as "COLD". You can even include or exclude people depending on the section of your website they visited.

Affinity Groups

One of the great things that Facebook can do is allow you to target people based on the likes they have. So people interested in Classic cars, or superhero movies, can be targeted by you if those audiences are relevant to your marketing plan. Even identifying people who have liked interests similar to those liked by your clientele can prove valuable for targeting prospective clients.

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Demographics

Of course, targeting people by age, sex and other factors (or combinations) is the most basic way to segment your audience. For divorce lawyers, for example, eliminating “single” or “divorced” people would be a natural exclusion audience for ALL parts of a marketing funnel because they would not be good prospects for a divorce lawyer. Boomers, on the other hand might be a good fit for estate planning attorneys.

Locations

Location is another great way to target people. For personal injury lawyers, targeting the area around hospitals and rehabilitation centers would be a natural fit for finding prospective clients. Think about where your clients are bunched up - and target their location. For other lawyers looking to target the most people in your local area - find locations that host concerts or sporting events and target them when events are in town!

Lookalike Audiences

By uploading an existing customer list, FB can identify common traits and find you people who “look like” your existing client base. You can set the degree of likeness, but this is a good opportunity to find people who may already be likely to become clients with minimal prodding, since they share the characteristics of your existing client base.

OK, so you now know your creatives and your targets, let's break out the worksheet and plan this out!



PICKING THE RIGHT TYPE OF CAMPAIGN

So you have your creatives and you know your target audiences - how do you pick the right type of ad unit given there are so many?

For each type of audience, there is likely the right type of ad unit right under your eyes. While it is common for someone setting up a FB ad system to say “Hey, they offer conversions - thats what I want! I’m gonna choose that one for all my ads” you would be mistaken to do this. Why?

Because conversions are set up to be the MOST expensive type of engagement. And for most of campaigns in your plan, you aren’t looking for conversions, you are looking to move them down your funnel until they are RED HOT and ready to convert. At that point, it would be worth investing the most money on converting them into clients. Until then, focus on cheaper campaigns, like brand awareness, video views or other cheap and plentiful units to get the wide distribution you seek at the top end of your funnel. Lead ads, the most expensive, should only go to red hot leads in your funnel.



CREATIVE DEVELOPMENT

This will likely be the most labor intensive portion of the process. For this, I suggest you gather all your team members (and if you are a solo - ask your friends and family to help)

The first thing you need to do is develop what you think your potential clients need to know. Maybe, if you are a Nursing Home Abuse lawyer, you need them to know about what red flags to look out for. If you handle car accident cases, perhaps you need people to know about how to get their car fixed. If you handle Trusts and Estate work maybe you want to get people to understand how you can save their family headaches and taxes after the death of a family elder, or a divorce lawyer who wants to impart the dirty trials divorcing spouses play on each other. Get in the mindset of your potential client. If you could get them information before they suffered through a problem you could have solved - what would it be? You need to create this content so you can utilize it in your campaigns. In order to do this, I suggest a simple exercise that should take no more than 1 hour but yield dozens of ideas you can create content for.

Gather a group of anywhere from 6-10 people. Give each person a stack of about 50 index cards, blank.

Then instruct them:

“I’m going to set a timer and I am asking you to write down as many content ideas and who would want to get that message that as you can come up with in 3 minutes. There is no crazy idea. At some point you will write something down and then say “no” and want to throw away that paper. Don’t. We need that idea too.”

Set a timer for 3 minutes and let them start. Some will write furiously. Others won’t. But after 3 minutes have them stop and lay out all the cards. Identify the duplicates, get rid of one or more of the duplicate cards so you only have the one idea per card. Some people may not give you enough details. Flesh out what they put on the card so everyone understands.

Then do it again.

The great idea about this project is that the supply of ideas is endless. And the more you think, especially in a group dynamic, when there is no “silly” or “wrong” will get you another 15-20 per person.

By the end of 10 minutes you will have about 100 solid ideas.

The next part is the scoring, which takes longer – up to an hour or 2. Its going to take everyone’s input to think through the execution of the ideas.

Then you rank the ideas on 3 different point scales of 1-4

The first one is How Few Resources Are Required (money, people, etc)- for the example of a video roundtable, it would take a cameraperson, editing, participants, a moderator, etc. That would be a LOT of requirements, so you would rate that a 1. If they need few resources, score it a 4.

The next is How Does The Group Gut Feel Like This Is A Home Run. 1 is not so confident that anyone cares. 4 is Super-confident that people want to hear this information.

The final is 1-4 How Easy Will This Be To Scale? If is it easy (like blogging about the same thing for all 50 states, it might be a 4. If it is an example like the video roundtable, it would be a 1.

So you compile the scores:

The closest score to 12 is the best idea for content that is needed.

Now that you have all the ideas you need to create it. Now some firms may already have compiled some of this information for prior firm events or initiatives. You may own brochures or be able to download or compile resources from your website or other government websites. You may need to get in front of a camera to film some video or spend some time creating an ebook. But in the end, you will have an arsenal of content you can repurpose for this project. Ebooks make great video scripts with a few changes.

Once you have identified all your creatives that you will use or create for your advertising, be sure to create a spreadsheet outlining what they are, where they are, and who is best served by this information, to make it easier later.

PRO TIP

One of the greatest thing available in social platforms is the wildly broad areas of interest you can target. But how would you use that to your advantage when you are not the an advertiser selling branded t shirts to that groups fan base?

You use the interests in your creative!

So instead of having a bland “Top 5 things a 40 year old needs to do to protect her family” think along the lines of “What the Real Housewives can Teach us About protecting your family” and target the fans of the Real Housewives show! Or “What the NFL can teach us about Nursing Home Neglect” Even your creatives should be identifying gender and race differences in your artwork. Think - women in ads that target women, or 60+ year old men in ads targeting Boomer males.

By combining creatives with affinity groups, you can target select groups of people with a message that already piques their interest, and moves them from your cold list to your warm list. Once they start to engage with you, you can deliver tighter messages framed to move them down the funnel to your *hot* list.

And remember, maybe just getting them to join your firm digital mailing list is the end goal for staying top of mind. You don't need to convert the sale online to make this worth the effort.



CONCLUSION

At one point law firms were simply measuring cost per click as the sole metric for digital acquisition cost. You must look at a longer cycle when advertising on social, because what you want to do is build an audience of people familiar with your brand and receptive to your advertising when they need you. The tools outlined in this ebook are meant for an introduction to the concepts you need to understand and implement for success on social.

The social media paid marketing landscape changes every day. But sticking with fundamentals will enable you to manage your budget, avoid chasing shiny object syndrome, and deliver steady manageable results you can rely upon for years.

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