Automating Your Digital Marketing Strategy

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> It's a common problem: you need marketing to sustain your law practice, but it often plays second fiddle to the everyday practice of law. By applying simple automation tools to your marketing content, you can market your practice and get legal work done at the same time. In this session you'll learn how to streamline content generation, social media engagement, website effectiveness, and more.

1. Introduction

Marketing - when properly executed - can be the lifeblood of a law firm. The need to generate consistent interest in your services is more important now than ever before. Recognize that marketing is another word for communication and who needs consistent communication more than your current clients?

One way to look at marketing is that of a service department. It serves the business in all areas - to generate interest, to support clients, and even to keep the clients you don't want from knocking at your door.

By automating your marketing you are able to build a brand image of knowledge and trust. It increases the likelihood of referrals by keeping your firm at top of mind, and reminds clients to post reviews for potential new clients to consider.

2. What is Marketing Automation?

Consider marketing automation a form of automatically communicating with an interested party. Which could include, but is not limited to: a prospect on your website, a current or former client, and a referral source.

Automation does not mean that you are not involved in the process, relinquish control or give up the option to communicate manually using traditional means such as the telephone or email. The purpose of automation is to supplement, not replace the communication you would normally have. For example how many times have you said to yourself "I need to reach out to _contact name_ today" but the day got away from you and it never happened. Or, how many times have you re-used the same language, instructions, or content in an email to potential or current clients?

The two examples above are areas where marketing automation tools can help whether it's something as simple as an automatic string of messages that go out when someone submits a form on your website or adding live chat or offering a scheduling tool for clients who want self-service. All of these vehicles dramatically improve communication without any additional effort required on your part.

Recent studies have shown that clients are expecting nearly instantaneous response as well as communication on nights and weekends both before and during the time they engage with a law firm. It is our goal to share both tools to help you automate communications, as well as practical examples you can adapt to fit your practice.

3. Automation is a Supplement, Not a Replacement

In business success is a numbers game. Yes, you have to be a good lawyer, care about your clients and exercise ethical practices. That said, your actions in the physical world are what builds your law firm's pipeline.

Facetime with current clients, attending networking events, and working your powerbase for referrals are a requirement. It is these activities that continue to line up new opportunities for your business.

By having marketing automation in place, you jumpstart the follow up process for new business. You make your law firm look organized and professional when working with current clients. Lastly, you set yourself up to be acknowledged and trusted as a resource for quality legal representation in the eyes of potential clients or referral sources.

4. Website Must Haves

First, commit to your website being your home base for all client communication. Where people can open a virtual door to your office, schedule an appointment or communicate with you digitally. Here are a few of the absolute 'must haves' that turn a law firm website into a communication powerhouse:

- A persistent "Contact Us" form is easily accomplished with plugins for WordPress users, or built in tools with all of today's website builders. All form submissions should go to an email that is monitored throughout the day, seven days a week.
- Persistent, clickable telephone number in a locked header. If you scroll down your website and the phone number or contact us form disappears, you are losing potential clients guaranteed. As impatient consumers we need a website to make life as easy for us as humanly possible.
- A pop-up for email collection for growing your marketing list. While some people may find pop-up forms annoying, they work! Pop-up forms in exchange for valuable information outperform traditional 'eNewsletter' sign up boxes by over 30%.
- Lightboxes are the semi-transparent boxes on a website that ask for an email address or suggest you check out a relevant piece of material specific to that website page. When used properly, they can not only generate a new lead for your business, but also enroll

the contact in an automated marketing campaign that educates them on the value of hiring your firm.

The tools above bridge the attention span gap that most legal consumers battle. When they are finally ready to reach out to a law firm, it is your duty to make that process as simple and fast as possible. By offering a variety of options and valuable resources they can voluntarily enter a communication process that will lead to an appointment or conversation. Then you can determine if you are able to service them. Which keeps them happy, and you in control.

5. Marketing and Automation Tips

In order for your marketing efforts to generate business for you there are a series of best practices that industry professionals recommend. These habits help keep your data clean and manageable. An example of why best practices are important is to avoid a situation where potential clients interested in estate planning aren't getting bankruptcy related emails.

- Mark and Maintain Your Client's 'Status' Accordingly

Use software to track and manage the interests and status of all of your contacts. Such as client, former client, business contact, referral, or not a fit.

- Use Lead Status to Measure ROI

For anyone familiar with managing a 'sales pipeline' it is important to know how many clients you have in each stage of the conversion process. For prospects who have not yet retained you, but have engaged with a particular piece of content, reaching out to them is a critical part of moving them towards an appointment. This can only be done if you are tracking the lead's stage in software designed to do so, or with custom fields or tags.

- Measure ROI by Lead Source

Marketing automation also allows you to tag a contact with information on where they came from. If you are using the same phone number for all of your marketing efforts you won't know which methods are working, and those you should cut. When you use a CRM or automated marketing system you can use different forms, or tracking links to measure the success and financial return of each of your marketing vehicles. Simply add a custom field for 'lead source' if it is not already included in your CRM or practice management application. Every campaign, advertisement or marketing program you run should be tied to a unique url, phone number, or identifier for comprehensive tracking.

6. Marketing and Automation Goals

Marketing automation is not something that you decide to do, and a week later are good to go. It is a process that takes time and effort. Don't dive into it like a New Year's Resolution, you will not lose 10 lbs in 5 days and are more likely to get frustrated or hurt yourself. Instead, outline a series of goals, then create a list of projects that will move you in the direction of accomplishing them. An example would be to create one email campaign, or communication 'workflow' per month.

Next, set clear expectations for both yourself and your teammates. It is important to understand that marketing automation and marketing of any kind are not overnight success stories. Almost all marketing efforts require ninety days of testing to determine if they are able to bear fruit. In many cases, you will test different subject lines in marketing emails or change the color of a landing page to see if it impacts the success of a campaign.

Make sure your marketing goals are realistic. Before you make your plan, think about the past - what worked and what didn't, and what you think you can do. Don't overburden yourself with goals or you will be stressed out and will not accomplish anything. It is better to have smaller, attainable goals than loads of lofty, unreachable ones. Start small so you achieve some early success and build momentum. Increase your goals as you have success. Give yourself a deadline for each goal, it doesn't matter if you accomplish your goal by that date. Having a deadline increases the likelihood that you accomplish the goal at some point. For instance, a goal would be to call three law school friends and reconnect - NO, instead say call one law school friend each Friday afternoon for the next four Fridays and see if they have time to meet for coffee or a drink in the next couple of weeks.

Take a look at your business plan. What are your key goals? Can you break those goals down into smaller action steps? For instance, a key goal is to be recognized as top young lawyer in the local land use/zoning practice area. Break it down into smaller component parts: 1. Attend all bar association land use committee meetings; 2. offer to write a column on residential land use issues for the local community organization newsletter and other neighborhood group newsletters; 3. ask a senior land use attorney who no longer deals with residential issues to help you learn the ropes and develop your practice.

Consider a task management application for helping you or your firm stay on track with marketing efforts. Simple tools from To-Doist to Asana can help you stay on track. Asana (https://app.asana.com/)is a simple free-for-limited use project management/checklist management tool. You can have multiple owners of marketing projects, each project has checklists with tasks and sub tasks, conversations, a calendar, progress meter and files. It integrates with Dropbox and Box. You can assign tasks to people with due dates and attachments, and each person gets a dashboard. Premium at $7 per user per month gives you custom fields, task dependencies, and private projects within your domain.

Need more help staying on track? There are virtual marketing coaches. Lawcountability® (http://lawcountability.com/), created by Ari Kaplan, is a cloud-based software platform designed to help lawyers network more effectively for their business and professional development. Subscribers watch an original ten-minute program, which offers creative ideas for raising their visibility and reaching out to others. Every program assigns three tasks based on the week's theme. Origination Station http://theoriginationstation.com/ from Steve Fretzin offers interactive and engaging videos, plus coaching sessions.

7. All About Content

Providing useful and timely information is one of the best ways to market your firm's knowledge. While you may want to include a call to action ("Follow Us on Twitter", "Sign Up for Our Newsletter", "Like Our Facebook Page", "Contact Us for a Consultation", etc.) where you deliver content, content marketing is an effective way to communicate with potential, existing and former clients without a sales pitch.

Looking for ideas? You will need to consume a lot of information in order to generate timely content. One way to make that easy is to use a feed reader, like Feedly (http://www.feedly.com). Subscribe to online news outlets, keyword alerts, and RSS feeds to create a steady stream of useful headlines to scan through every day. If you see an article that catches your interest you can tweet, blog, post and share the information immediately from the application. Or save it for later by adding it to Evernote, Pocket or marking it to "read later" in the app. How does it all work? See the video at: https://vimeo.com/224529087/9f9d83823a

Are you writing original content? Once your content is generated get it out there! You can automate this process, though the "how" varies depending on your blog or publishing platform. In Wordpress you can search for an add-on or widget that lets you automate the process. Wix automatically asks if you want new blog posts to be fed to Twitter and Facebook. IFTTT (If This Then That) will let you set up a recipe to share posts from WordPress, Weebly and any blog platform that generates an RSS feed to any social network. If all of the above sounds a bit outside your comfort zone check out dlvr.it (https://dlvr.it/pages/learn-more.php) which is a free (for 5 feeds and 3 social pages/profiles) tool that monitors your blog for new content and shares it with your social networks. It is simple to set up, and will help you spread the word to highlight your blogging efforts. Dlvr.it Pro will further your efforts by reposting content on a schedule and more.

Don't have time to gather, read, digest, regurgitate, compose and post content with regularity? Scroll Digital http://www.scrolldigital.com/ and ClearView Social http://clearviewsocial.com/ help bring in content, push out your content and manage the firm's online presence. Scroll Digital will also create content for you. Basically, these services combine the process of gathering content, creating content and pushing content out – and manage it for your firm.

8. Social Media Management

If you choose to use social media platforms such as Twitter, Facebook, LinkedIn or Instagram be aware that your social presence says a lot about your firm, especially if you are not responsive or rarely post. A prospective client linking to your firm's Facebook page from your website should see an active presence and 100% responsiveness. If you can't maintain that then take down the page.

There are many tools on the market to help make managing multiple social media platforms easier. You can see all your social media profiles and messages in one dashboard – and send to them all as well with Hootsuite (https://hootsuite.com/). You can schedule messages, have Hootsuite send messages at the best time, and more. Paid versions of Hootsuite can also track engagement. Similar products include SproutSocial (http://sproutsocial.com/), Everypost (http://http://everypost.me/), Buffer (https://buffer.com/).

9. Email Marketing

Whether a campaign or a newsletter, it is important to use a tool designed for email marketing versus sending out email BCCed from your inbox. Why? You need to be able to track subscriber lists, provide unsubscribe options and comply with CAN SPAM, send simultaneous HTML and plain text messages, do A/B testing, and track opens, clicks and bounces.

Inexpensive and easy to use email marketing tools include MailChimp (https://mailchimp.com/), Constant Contact (https://www.constantcontact.com/) , Drip (https://www.drip.com/) and Get Response (https://www.getresponse.com). Your decision making process for choosing an email marketing tool will be determined by price and integrations with tools you already use.

10. Capturing Contacts

In addition to using your website form to collect contact information from potential clients, you want to capture contact information from email signature blocks and business cards.

Evercontact works with Gmail, Google Apps, Outlook, Office 365, iPhones, and CRMs like Salesforce and Highrise. The software automatically creates and updates contacts from email signatures and sends them to your address book. Basic service for a single user is free, though there are group and Pro plans with more bells and whistles. One premium feature called "Flashback" looks at your email for the past five years and collects the contact information (that is, if you hang on to email that long) for a one-time cost of $99 or $49 for one year of analysis of your email archives. Evercontact will show you what it is adding and give you the chance to accept or reject it — so it isn't so automatic that it fills your contacts with people you don't want there.

By collecting email addresses in your contacts manager, like Outlook or Google Contacts, you can then export them to other applications to make use of the intelligence and send marketing messages. If you want to tag them be sure to capture the notes field in the export, which indicates the information was collected with Evercontact.

And, don't forget to scan those business cards you collect at meeting and events into your contact manager.

11. Moving Communication to Consultation

By offering either free or paid consultation times right on your website you can attract more clients who are ready to begin! The tools below save both time, and have the ability to generate consultation booking fees directly from your website. Not to worry, in the event the client is not a fit for your law firm refunds can be processed easily.

Tools like Calend.ly (https://calendly.com/) which starts at $8 user/month for premium and ScheduleOnce (https://www.scheduleonce.com/) which starts at $5 per user per month make it easy to connect your Outlook or Google calendar to show free/busy times on your website at select intervals for individuals or teams to let people “self help” and book appointments without the friction of calling the firm and getting a voicemail or a distracted receptionist. These tools will also send meeting reminders and cancellations. With integrations with MailChimp and Zapier you can automate follow-ups and communications. A similar tool, Bookings comes with Office 365 https://products.office.com/en-us/business/scheduling-and-booking-app

Not quite ready to have automated bookings? Consider a virtual assistant through X.ai https://x.ai/ . You can work with Amy or Andrew and let them schedule meetings with your clients. The team version at $40 a month gives Amy and Andrew their own company email addresses and syncs them with all internal calendars. As you work with Amy and Andrew they get smarter and learn your preferences. Don’t miss an opportunity because you delayed setting up and appointment - let Amy and Andrew handle it for you.

12. Automation Magic

Now that you know what tools you can use to jumpstart different parts of your marketing the automation can begin. If This Then That (https://ifttt.com/discover) is a great way to stitch your marketing applications together. It includes over 56 Channels – phone, RSS readers, Google products, blogs, social media, web 2.0. For instance:

- Receive a notification when a new subscriber is added to your MailChimp list
- Send a tweet from your Wordpress blog post
- Automatically tweet articles (or add them to Facebook) when you tag them with a specific tag in Feedly
- Create Asana tasks for starred emails in Gmail

Also for Office 365 there is Flow http://www.theverge.com/2016/4/29/11535232/microsoft-flow-ifttt-competitor which adds Microsoft Office and 365 applications to the automation mix. For free.

Similar to IFTTT is Zapier which offers 5 zaps for free that will run every 15 minutes with up to 100 tasks per month to make it easy for you to automate tasks between web apps. Zapier has over 500 Apps you can connect, with a focus on business services ranging from legal SaaS Clio to Basecamp to HelloSign. So, how can this work for you? Automatically save attachments in Gmail to Box. Create tasks and to-dos from new emails automatically. Create a Gmail label from new Clio matters or add new Clio contacts to a MailChimp list. A few clicks and you can automate activities that you either had to do manually, or just plain forgot to do.

Interested in Zaps for lawyers? Check: https://lawyerist.com/111159/zapier-zaps-lawyers/

13. CRM and Practice Management

"What's a CRM, isn't that what a practice management system does?" First you must understand what each tool is intended to accomplish. To do this, let's focus on the two distinct areas of a law firm processes: front of the house and back of the house.

Front of the house is where all pre-client or prospect interaction occurs including answering the phones, client intake, and retention. Back of the house is where the delivery of the actual services, and payment occurs. A CRM (Customer Relationship Management) system is designed to support the front of the house sales process, while traditional case management features are built to help track, streamline and execute the back of the house processes. Herein lies the confusion. Think about the 'statuses' or names you would use to describe a contact during the time-frame when they are working with your front of the house team. A standard set of contact names, life-cycle stages are:

- Lead
- Prospect
- Potential New Client
- Opportunity
- Won
- Lost
- Not a fit
- Client

Now, let's assume that you close that client and they retain your services. At that time they become a back of the house contact or client. You will also need to associate other contacts with them related to their matter. Including but not limited to:

- Party
- Spouse
- Judge
- Mediator
- Expert Witness
- Child Custody Evaluator
- Insurance Adjuster
- Defendant

- Plaintiff

There may be several more depending on your area of law or case type. As you can see, the two lists are very different. Until recently the general population of lawyers have not had to monitor marketing efforts in a laser focused manner. Now the marketing and business development aspects of running a law firm have changed. It is critical that law firms track and manage their leads. Which requires the use of tags, life-cycle stages, or a CRM tool dedicated to just that function of the business.

Practice management software platforms, particularly those in the cloud, have done some work in this area. Most provide users the ability to tag or identify that a contact is not yet a client. However, the real feature gap lies in the management of that specific group of contacts. So much can be learned about where your law firm clients are coming from simply by utilizing CRM features.

When law firm staff tracks the stages of a lead in the initial intake and appointment process those actions can translate into thousands of dollars in new business or saved marketing expenses for the law firm. How? By running a report or filtering contacts by status you can quickly project how many potential new cases you can expect. On the flip side, you can also gauge which marketing sources are producing the most viable potential new clients.

But these tools only work if they become part of your process. Which means either taking the time to learn how to use tags, custom fields, or prospect level features in your existing software, or invest in a CRM dedicated to business development portion of your business.

So, why invest the time and money in CRM features?

Here are just a few ways CRM features, when properly used, can make your law firm more money:

- Identify your highest producing marketing sources. Increase spend in these areas to watch the cost of acquiring a new client drop, while top line revenue grows.
- Gain the ability to go back to clients who did not retain you when you first spoke. This is an untapped area of revenue for so many law firms! Consumers can take up to one year to retain an attorney. Where did they go after speaking with your law firm? All contacts with a CRM stage of lost opportunity, or tag such as “not ready yet” can be filtered and called upon during staff downtime.
- Targeted marketing. A CRM tool also has built in communication methods to send mass messages to contacts in a status. Let’s say they spoke to you when they weren’t ready. You can segment those leads and send them a follow up campaign, or helpful video. List segmentation can increase law firm conversion rates much faster than sending those leads the same newsletter that the rest of your list receives. Use segmentation and life-cycle stages to tailor a message that is specific to that group.

- Focus intake and associates time on the leads that matter most. Instead of throwing a net into the ocean and filtering out the type of fish you want use CRM tools to identify the leads that have the most potential in retaining you.
- Master and automate the intake process. A CRM is designed to help you generate leads. A case management system is designed to help you execute the work that the leads are paying you for. Leverage the automation process between your website, eBook and intake staff. Use tools that share forms, send template emails and e-sign ready retainer agreements to get them past the finish line as fast as you can. Then spend the time you saved delivering an amazing client experience.

A true CRM is meant to be a sales powerhouse. The same thought process you use to set deadlines, reminders and automate tasks with a practice management system should be used for your leads too.

14. Marketing Automation Secret Weapons: Legal CRM

The following tools allows you to create intake forms, online retainer agreements, and automation journeys such as appointment confirmation, intake forms, post-consultation retainers. What makes them unique are tools like ‘pipeline forecasting’ and integrations with your calendar or case management platform.

Lexicata (https://lexicata.com/) is a CRM made specifically for lawyers. What makes Lexicata special is it is more of a hybrid between a CRM and a client intake software, which makes the most sense for law firms. Its platform also allows you to capture lead information with its intake form system, create and send documents for signing (e.g. retainer agreements, other boilerplate forms), and track your matters up until the client is signed. It also integrates with Clio, the most popular cloud-based practice management software for lawyers. The tool has contacts management, lead tracking, tasks/reminders as well as online intake forms and engagement letters with esignature.

LawRuler (https://www.lawruler.com/) is a AI driven intake process that includes CRM, email marketing, text messaging campaigns, phone/call tracking, referral management and esignature tools.

Avvo Ignite Suite (http://ignite.avvo.com/avvo-ignite-suite.html) tracks incoming leads from a variety of channels, uses email templates to connect with incoming contacts, schedules emails through the decision making process and manages the business pipeline.

Lawmatics – new to the market, Lawmatics even provides you with sample content to encourage you to jump in and start using right away! It tracks leads, follows up with email and text messages, helps schedule appointments, tracks success, shows analytics to show which leads might be most profitable and far more.

15. Practice Management Crossovers

Practice management application developers are quickly realizing the need to provide a 'front of the house' suite of tools for automating client communication, embedding forms on the law firm's website then offering extensive options for enrolling the contact in a communication series, sending appointment reminders and assigning case related tasks to staff. Here are some examples:

- Actionstep – Built in automation tools for client communication, API also available.
- Centerbase – Built in Forms, and Automated Workflows, plus an extensively documented API.
- Clio + Integrations – Expand the traditional Clio platform by integrating with tools such as Lexicata, LawLytics, BirdEye and LeadDocket (to name a few)
- PracticePanther + Mailchimp & Text Message Reminders

16. Conclusion

It should be noted that firms can use one or a combination of these tools, in conjunction with products they already use. Get familiar with what these tools do, then figure out what works for your firm. Law firms should consider the application of the Rules of Professional Conduct 1.6, 1.18, 5.1-3, 7.1-4, including the differences in varying jurisdictions and ethics opinions, in light of the lawyer's marketing efforts.

In 2012, the ABA amended ABA Model Rule 1.18, Duties to a Prospective Client. Most notably, it changed the definition of "prospective client" from one who "discusses" with a lawyer the possibility of forming a client-lawyer relationship to one who "consults" with a lawyer about the possibility. That was a tightening of the rule made specifically in response to the increasing variety of electronic communications among lawyers and the public. Note also that there is a difference between giving legal information and giving legal advice. Avoid answering fact-specific questions. Provide answers that are general in nature and – allow me to repeat – include a disclaimer that the answer is not legal advice and not intended to form an attorney client relationship.