

ANNUAL
**LAW FIRM
BUSINESS
PLANNER**

From the legal marketing experts at
FindLaw, part of Thomson Reuters.





“The best is yet to come.”



This planner belongs to:

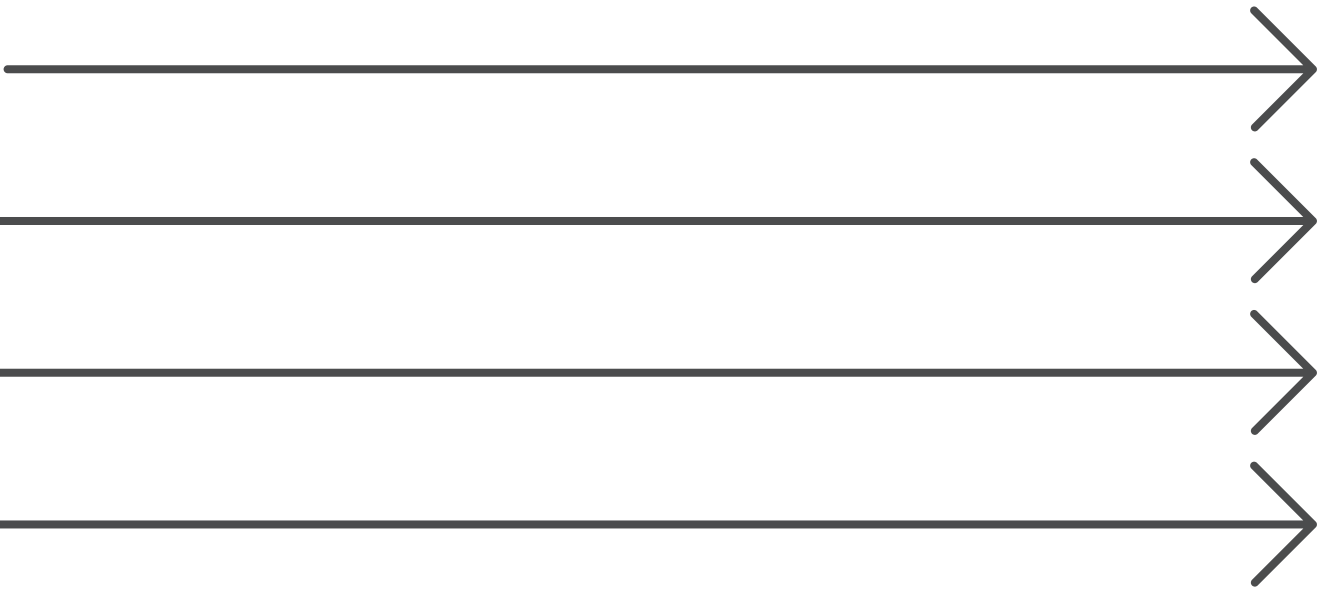
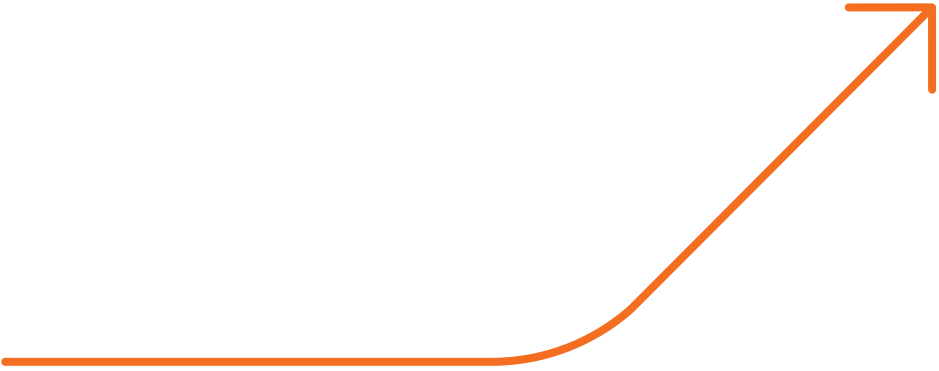
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What are the tools that will ensure your law firm remains profitable and sustainable over time?

While there's no way to insulate your practice from everything that could potentially bring change, at the very least, you can try to look into the future and think about what might be coming down the pike. What are your goals? What do you want to accomplish in the next 12 months?

The purpose of this planner is to help you identify your business objectives and the steps to take to accomplish them. From figuring out your business plan to tracking your budget, it has what you need to make your firm's dreams a reality. With the tools and tactics we've outlined in this piece, you can help put your law firm's growth on more sure footing. It includes essential resources to utilize throughout the course of the year, such as:

- Business vision and growth strategy
- Annual and quarterly goal planning
- 90-day budget tracker and business review



Being the attorney legal consumers want to hire

Becoming a virtual virtuoso

Virtual consultations provide a safe, easy, and cost-effective way to see, communicate, and connect with current and prospective clients. See tips for how to build and maintain rapport while servicing clients virtually.

- When conducting a video consult, it's best to find a quiet and private place.
- If you're conducting a consult from home, make sure to select a location where you won't be interrupted by pets, family members, or your neighbor's lawnmower.
- Be sure to pay attention to what's in your background. The last thing you want, is to have the person on the other end distracted or somehow put off by what's on your television, bookshelf, or wall.
- When it comes to selecting what to wear for a video consult stick with muted colors (nothing too bright or flashy) and keep accessories simple and understated.

What makes a good attorney bio?

Attorney bio pages are consistently among the most visited of all pages on law firms' websites. This makes sense, as legal consumers want to know more about you — the attorney they need to trust to handle their matter.

Every attorney says they are experienced. However, it's much more convincing to provide actual details about your achievements that demonstrate this fact. Including information about your professional credentials is far more compelling than simply saying "I'm an experienced lawyer." Consider including the following in your bio:

- Education
- Areas of practice
- Bar admissions
- Representative cases
- Honors and awards
- Professional associations and memberships
- Published works
- Community service

Top 3 tactics to enhance your firm's digital presence

There are countless tactics you can use to boost your marketing in the coming year. What tools will help your firm reach your marketing goals this year and get ahead of the competition?

Optimize your firm's Google My Business Page

In order to compete online, you need a Google My Business™ (GMB) listing. According to Statcounter, nearly 90% of people in the U.S. use Google to search online. And when they are searching for legal services, GMB listings are among the first to appear — and are often above even the regular search results. Additionally, many legal consumers use Google Maps™ to find a local law firm. To appear on that map, you also need a GMB listing.

Create a robust stable of online reviews

People love online reviews, and if you ignore them entirely, you're failing to take advantage of a powerful marketing tool. Not only that, but you're neglecting a key element of your law firm's image — and are doing so at your own detriment. Instead of hanging back and taking a "what will be will be" approach to online reviews, it's far better to be proactive and ask clients to write them. You're being participatory and nurturing a body of positive reviews that will help you appeal to future clients.

Make sure your website is mobile responsive

It's no longer an option, your law firm's website needs to be mobile-optimized. That means, regardless of whether a potential client is visiting your site from a desktop computer, their phone, or their tablet, the design of the website automatically adjusts for the best user experience. That includes your phone number converting into a click-to-call button when accessed on a cell phone. After all, you want to make contacting your firm a quick, thought-free action.

Making the most of your law firm's tax write-off

If you and your law firm can afford it, use the end of the calendar year as an opportunity to invest in yourselves rather than carry profits into January — and pay the increased taxes they bring. Admittedly, that's a big "if" for some firms. But, there's no need to spend in excess. Below are a few ideas on how to use the waning days of the year, as a head start.

Update your look

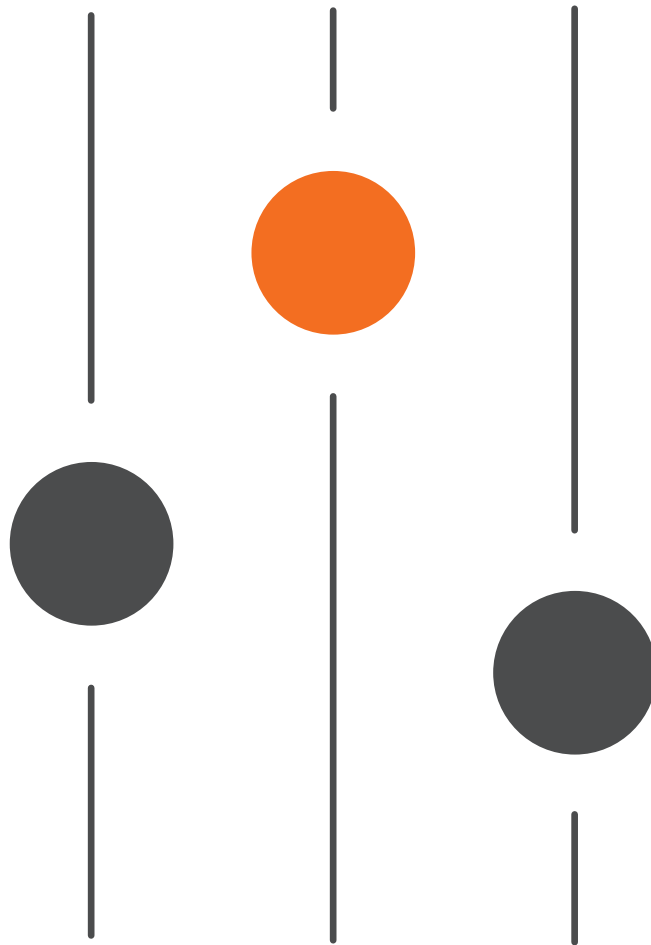
Maybe your brand images were created when you first started out, perhaps with little money or input from professionals. If you have extra money to spend at the end of the year, it's worth taking a second look at your law firm's art and design.

Because tax write-offs extend to marketing contractors, the year's end is an opportunity to meet with graphic designers and brand experts to assess your law firm's image. Changes in artwork cost money and can take time. If you're interested in a major (or even minor) brand redesign in the coming year, it's better to start now, especially if you're currently paying the bill.

Try something new

Marketing strategies are like plants. It takes patience and care for them to grow. If you want to branch out into a new medium like pay-per-click (PPC) or directory advertising, use the tax-write off to start your campaigns now. The head start will allow your ads to mature and gain traction in time for the new year when you're aiming to add new clients.

It's especially true that PPC campaigns don't happen overnight. Setting up one of these campaigns, allows your firm to create a PPC ad that is linked to a specific set of keywords and topics that prospective clients are likely to use when searching for an attorney online.



THE ONE-PAGE BUSINESS PLAN

VISION & PURPOSE	<i>Why does our law firm exist and for whom are we solving a problem? What is our law firm's purpose? What is driving me? How will our practice look in one, three, and five years?</i>
MISSION & VALUES	<i>How will we achieve our vision? What are our values and what does our firm stand for?</i>
GOALS & OBJECTIVES	<i>What will we actually achieve through our practice? What are our targets? What are we going to be the best at?</i>
STRATEGY & OPERATIONS	<i>How do we plan to achieve our goals and deliver our services? What is our strategy for executing our plan? What are our marketing plans? How will we ensure great customer service?</i>
TEAM & STAFF	<i>Who are the key players that will make up our team? Which external partners do we need to work with to execute our strategy?</i>
VALUE PROPOSITION	<i>What will we actually achieve through our practice? What are our targets? What are we going to be the best at?</i>

BUSINESS VISION

Describe how you see your law firm progressing in the future:

ONE YEAR	
THREE YEARS	
FIVE YEARS	

BUSINESS GOAL PLANNER

This 4-Step Goal Planner is your opportunity to create and map out key law firm goals that you will focus on through 2021.

1

2

3

My Key Goals

What areas will I focus on this year?

1. The What

*What is my specific goal in this area of my business?
What outcome do I want?*

2. The Why

Why is this goal important to me? Why do I want it?

3. The How

How, in detailed steps, am I going to make this goal happen?

4. The When

*When will I achieve this goal? What is the timeline?
When is the deadline?*

QUARTERLY GOAL PLANNER

Three key goals we are focusing on for the quarter.

GOALS			
STRATEGIES			
OBJECTIVES			
TACTICS			
TARGET DATE			

NOTES

JANUARY

S	M	T	W	T	F	S
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30	31					

FEBRUARY

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MARCH

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Q1 BUDGET TRACKER

EXPENSES/PROJECT	BUDGETED	ACTUAL	DIFFERENCE
TOTALS:			

PROJECTED INCOME	ESTIMATED	ACTUAL	DIFFERENCE
TOTALS:			

90-DAY REVIEW

Take some time to celebrate your progress, identify what needs attention, check your work/life balance, and reset your focus for the next 90 days. Then use these new insights to plan your next quarter.

WHAT HAVE WE ACHIEVED THIS QUARTER?

WHAT'S WORKING AND WHY IS IT WORKING?

WHAT'S NOT WORKING AND WHAT CAN I DO ABOUT IT?

HOW MANY NEW CLIENTS DID WE SIGN UP THIS QUARTER?

WHAT WAS OUR AVERAGE CASE VALUE THIS QUARTER?

WHAT WAS OUR TOTAL REVENUE THIS QUARTER?

HOW MANY REVIEWS/TESTIMONIALS DID WE RECEIVE?

- | | |
|---|--|
| <input type="checkbox"/> Review your one-page business plan | <input type="checkbox"/> Plan next quarter's business objectives and goals |
| <input type="checkbox"/> Review your business vision | <input type="checkbox"/> Celebrate your progress! |

QUARTERLY GOAL PLANNER

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GOALS			
STRATEGIES			
OBJECTIVES			
TACTICS			
TARGET DATE			

NOTES

APRIL

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MAY

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JUNE

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26	27	28	29	30		

Q2 BUDGET TRACKER

EXPENSES/PROJECT	BUDGETED	ACTUAL	DIFFERENCE
TOTALS:			

PROJECTED INCOME	ESTIMATED	ACTUAL	DIFFERENCE
TOTALS:			

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GOALS			
STRATEGIES			
OBJECTIVES			
TACTICS			
TARGET DATE			

NOTES

JULY

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AUGUST

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SEPTEMBER

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Q3 BUDGET TRACKER

EXPENSES/PROJECT	BUDGETED	ACTUAL	DIFFERENCE
TOTALS:			

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QUARTERLY GOAL PLANNER

Three key goals we are focusing on to end the year strong.

GOALS			
STRATEGIES			
OBJECTIVES			
TACTICS			
TARGET DATE			

NOTES

OCTOBER

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30	31					

NOVEMBER

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DECEMBER

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GROWTH STRATEGY

This worksheet will help you create a simple strategy for identifying the key turning points in your practice while easily spotting new opportunities for growth.

Reflect back on the past year and, using those insights, answer the following questions:

TURNING POINTS

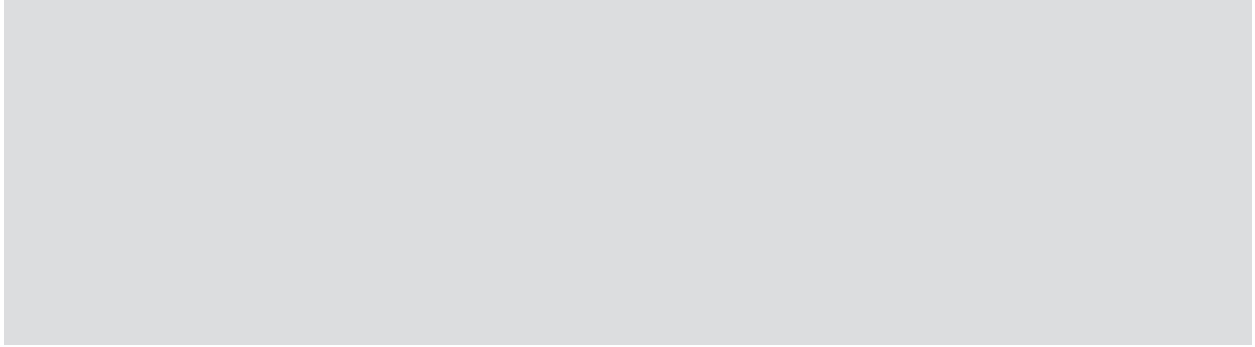
The projects, events, marketing tactics, decisions, or turning points that have created the biggest positive change to the success of my practice in the past year are:

MY GROWTH GOALS FOR THE NEXT YEAR ARE:

- 1)
- 2)
- 3)

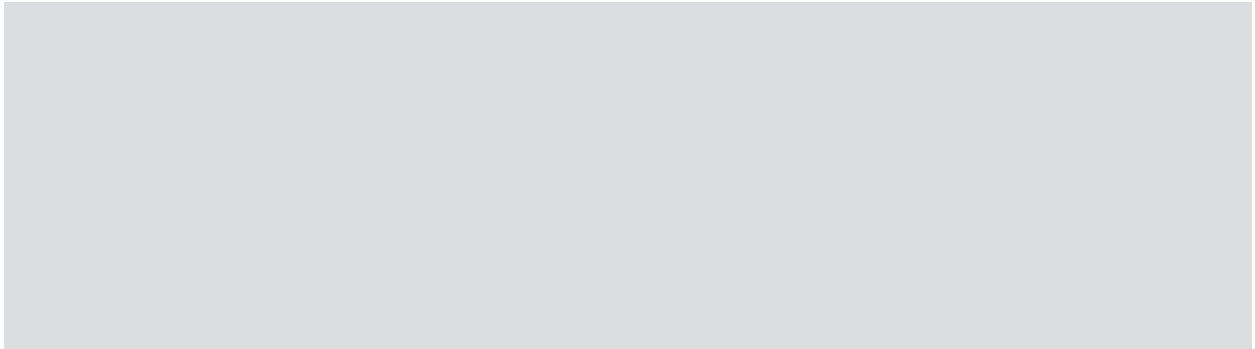
WHAT'S WORKING

How can we do more of this?



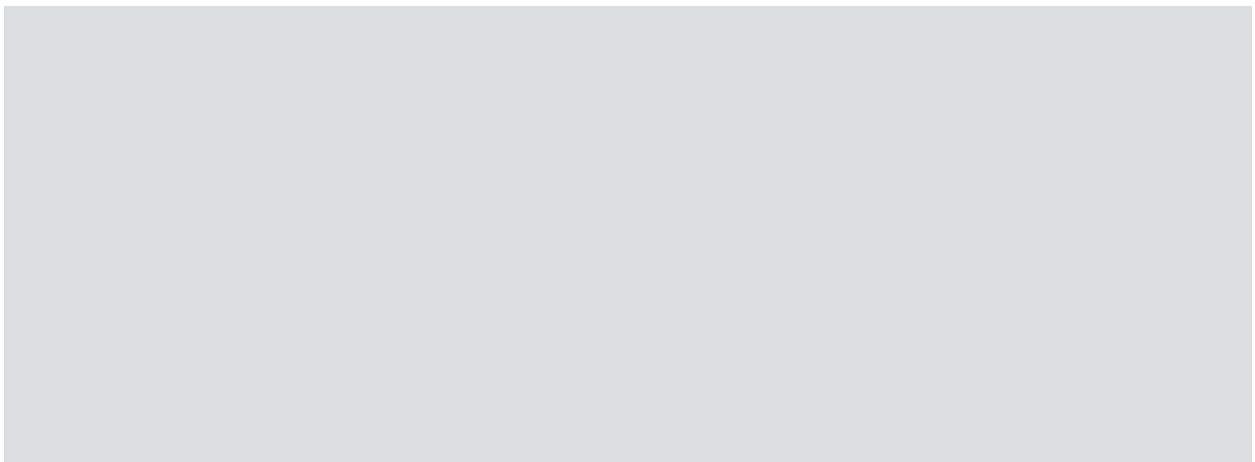
WHAT'S NOT WORKING

How can we do it better? What do we need to stop?

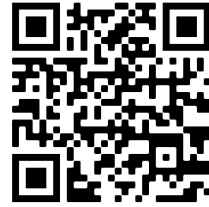


OTHER IDEAS FOR GROWTH

Are there other practice areas we should target? New marketing tactics we should implement?



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Using Integrated Digital Marketing to Enhance Your Solo Practice



Research, ROI, and Refinement
Optimizing your legal marketing strategy and proving its value



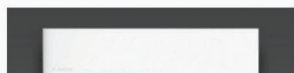
Online Marketing Essentials
For small and solo firms in uncertain times



The 'Gram In An Instant
Understanding How Instagram Can Benefit Your Law Firm



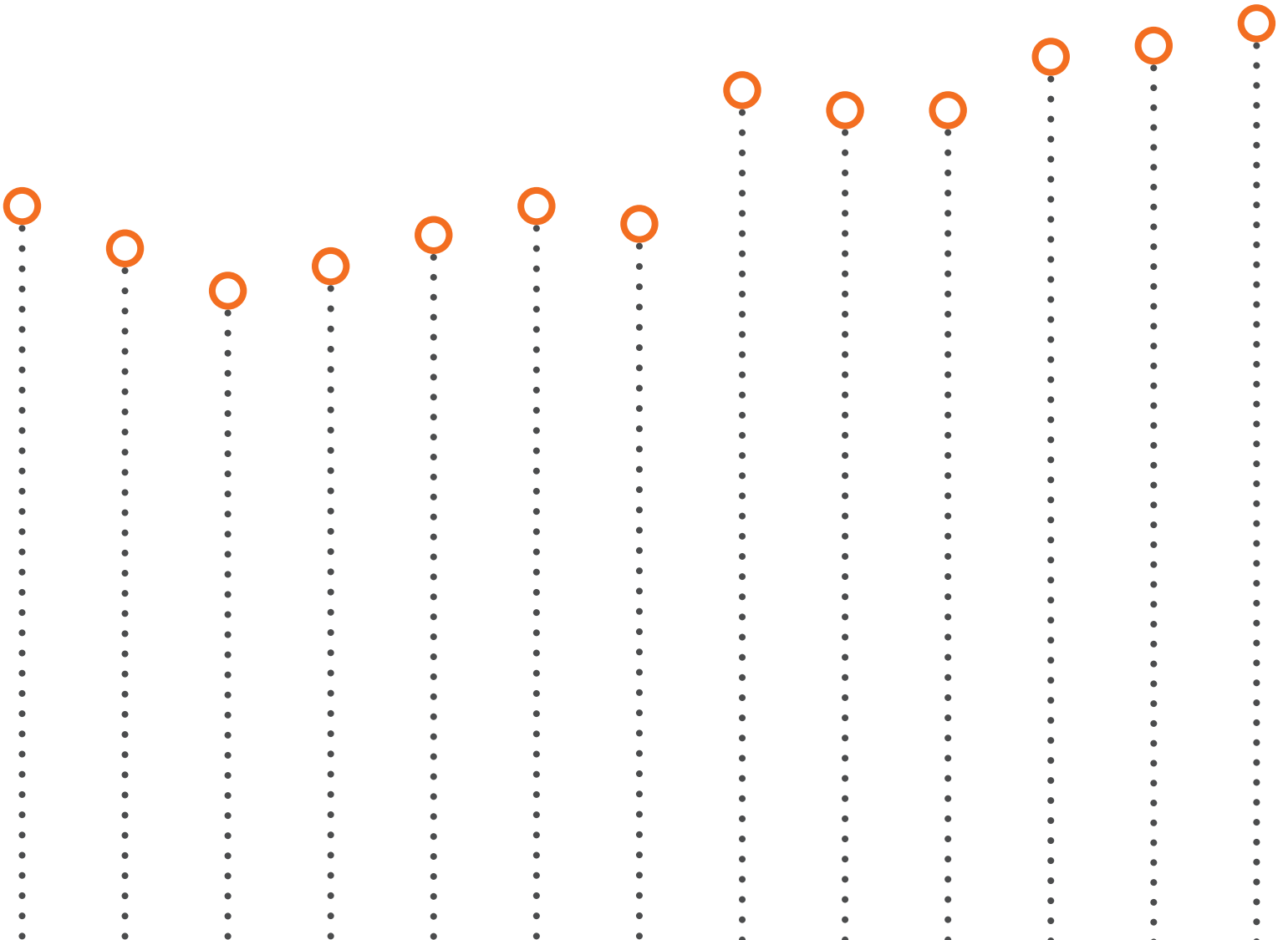
7 Things You Don't Know About Your Clients
And What You Can Do To Serve Them



NEW HORIZONS

**“Most people can see,
but not everyone has vision.”**

- Anonymous



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