



## Rainmaker Habits & Assets for the Virtual Marketer

### Habit 1, Three Marketing Contacts a Week:

Keep it on your weekly time template and do it virtually!  
 Send cards: thank you, birthday, anniversary, welcome, etc.  
 Share webinars/articles  
 Schedule a phone call or videoconference  
 Offer your assistance during this challenging time

### Habit 2, Asking for Referrals:

Include a nice request on your engagement and closing letters as well as your email signature block  
 Discuss during calls and videoconferences  
 Add to your client intake scripts and any webinars you are hosting or participating in  
 Post on your website and social media pages

### Habit 3, Sharpen the Saw:

Read a marketing book, attend a marketing webinar, read marketing blogs/articles  
 Earn a CLE

### Habit 4, Thank You Habit:

Implement a recurring time for you or your staff to send thank yous to clients, potentials and referral sources after intake, daily or weekly  
 Develop your system for what you will send to whom and for what reason, e.g. a referral source sent a potential who did not become a client, a referral source sent a potential who did engage, a client sent a referral

### Habit 5, Adding Names:

Get those business cards into your contact management software now!  
 Collect names from webinars you are participating in and add to your CMS  
 When setting up future meetings, ask your contact to bring a guest to join

### Asset 1, The Top Twenty:

Reassess your list, add new names, identify referral sources who have tapered off recently and get in touch with them ASAP  
 Rank your current and potential referral sources and create a plan to follow up with them  
 Gather personal info such as birthdays, anniversaries, hobbies, favorite restaurants, etc.

### Asset 2, Contact Management Software:

Research and select/prepare to purchase CMS  
 Learn to set up and fully implement  
 Clean up database  
 Add personal info to your CMS

### Asset 3, Marketing Assistant:

Look for good talent to bring on or prepare to hire  
 Utilize current MA to assist with virtual marketing strategies  
 Develop scripts for your MA

#### Asset 4, Laser Talk:

Draft it, revise it, use it on calls and videoconferences

#### Asset 5, Storytelling:

Use your real experiences to tell your stories

Make the client the hero

Consider reading "StoryBrand" by Donald Miller

#### Asset 6, Professional Website:

Now is the time to update your website!

Add fresh content, record videos, write blogs and then share on social media

Consider contract work through websites like Fiverr, Freelancer or Upwork

Add awards and articles to Avvo, social media, website

#### Asset 7, PR Campaign:

Promote your public image by sharing community commitments such as being appointed to a board, sponsoring community events, volunteering, fundraising, donating, etc.

Promote your professional reputation by appearing on radio, TV or print as an expert, sharing a big case win/settlement, being published in a journal or trade publication

Pitch a story to the media

#### Asset 8, The Interview:

Research and develop questions

Conduct over the phone or videoconference

#### Asset 9, Accountability Partner:

Check in with your accountability partner - maintain your normal schedule of meetings

If you don't have one develop an accountability partnership

Join or create your own accountability group

Ask your accountability partner to invite others to your virtual check ins over the next several weeks

Co-host a webinar or a fun watch party on Facebook

#### Asset 10, Annual Marketing Retreat:

If you haven't completed one, now is the time!

If you did complete your retreat, re-visit your annual plan and marketing calendar to work on those objectives and projects that you can safely work on and have time to check off your list

#### Asset 11, Monthly Marketing Plan:

Continue to complete your plan to stay in the habit

Call your contacts and have a cheat sheet of things to talk about

Be creative with virtual meetings such as virtual coffee or cocktails via Facetime or Facebook Messenger

#### Asset 12, Signature Event:

Now you have time to plan that event!

Expenses may be a concern so consider an event for 2021, or co-hosting with a referral source

Piggyback off a community event such as an Alzheimer's Walk, etc.

(One attorney hosts an open house with silent auction prior to the walk and donates proceeds to it, then the firm enters a team in the walk.)

#### Asset 13, Client Intake Matrix:

Identify your ideal client(s) and their demographic profile(s)

Use this to grade current clients and create client intake scorecard(s)

Complete work for or train up C clients

Complete work for or fire D clients

Create intake scripts and train staff

Review and update current intake system

#### Asset 14, Referral Map:

Complete the referral map exercise and update your current referral map

Brainstorm new referral sources that influence your clients Add them to your farm team and nurture these relationships.

#### Asset 15, Client Aftercare Program:

Use downtime to consider and learn a new practice area and offer to current and prospective clients  
Create and send letters/emails to cross-sell services and post online  
Consider providing ancillary services that can be done virtually  
Provide a free webinar to explain additional services  
Implement a client care program

#### Asset 16, TOMA:

Staying in front of clients, referral sources and potentials is critical!  
Write articles, blogs, posts and website content relative to your audience(s)  
Provide updates on laws related to your practice area  
Send newsletters, eblasts, and letters to your audience(s) with this info and how you will continue to serve your clients  
Contribute articles to journals, trade publications, and local media

#### Asset 17, Tracking System:

Now is the time to review intake and conversion data to implement a tracking system if one is not already in place  
Use your tracking data to make crucial decisions about your marketing choices and expenses

#### Asset 18, Client-Centered Office:

Complete Form RM 18.01 Facility Checklist to identify updates needed for providing a clean and welcoming space for your clients and office guests  
Consider using local businesses to assist with office updates during this challenging time for small businesses  
Create/update your firm's daily operations checklists/systems e.g. paper triage, mail processing, opening/closing procedures, etc.  
Implement the clean office solution!

#### Asset 19, Professional Image:

Assess your "attorney costume" Dress slightly better than your clients  
Update wardrobe, if necessary, using online sites with delivery  
Assess your staff's appearance then have any crucial conversations if necessary Create a dress policy for your team and share with them

#### Asset 20, Marketing Time Template:

Create a time template or update your current time template to include standing appointments for marketing activities 3 times a week  
Include a weekly marketing meeting/planning session on your time template

#### Asset 21, Thank You System:

Order or re-stock your thank you cards and gifts, try using a local business  
Decide how you will send thank yous from your office: you write and send it, your team handwrites the cards and you sign, your team writes and signs from the firm  
Personalize thank you gifts using the information about your referral sources and clients you have stored in your CMS