



SUFFOLK ACADEMY OF LAW
The Educational Arm of the Suffolk County Bar Association
560 Wheeler Road, Hauppauge, NY 11788
(631) 234-5588



HOW TO RUN AND GROW YOUR LAW FIRM

Marketing Planning – Reach Your Goals by Reach the Right Clients

FACULTY:

Christopher T. Anderson, Esq.

Moderator:

Karen J. Tenenbaum, Esq., LL.M, CPA

May 12, 2022

Suffolk County Bar Association, New York

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There's a whole new way to obtain your CLE certificate! It's fast, easy and best of all you can see the history of courses that you've attended!

Within 10 days of the course you attended, your CLE Certificate will be ready to view or print. Follow the instructions below:

1. Go to SCBA.org
2. Member Log In (upper right corner)
3. If you **do not** know your username or password, click the area below and enter your email that is on file with SCBA. Follow the prompts to reset your username and password.
4. After you log in, hover over your name and you will see “Quick Links”. Below that you will see:
 - a. My SCBA
 - b. My CLE History
 - c. Update My Information
 - d. Update My Committees
5. Click on **My CLE History**, you will see the courses you have attended. Off to the right side you will see the Icon for certificates. You are now able to download the certificate, print it or save it. You may go to your history and review the courses you have taken in any given year!
6. **CLE certificates will no longer be mailed or emailed.** Certificates will be available within 10 days after the course.



Christopher T. Anderson, Co-Founder, Sunnyside Services, Ltd.

Christopher is a law firm business guru who works with lawyers owning law firms from start-ups to eight-figure powerhouses in the United States and internationally to transform their legal practices into businesses that serve them, and their clients! Christopher has also worked with companies from startups to the likes of LexisNexis, RealLegal and law.com.

Christopher teaches lawyers to succeed on their own terms!

Christopher speaks on issues central to law firm success. He debunks much of the “conventional wisdom” that has been passed down over the years and fills the gaps that were simply never taught. The “traditional way” has been hurting lawyers in their own practice and depriving prospective clients of their best services. Christopher’s vision of the business of law is one in which legal services are available to all, and law firm owners (and practitioners) thrive and succeed on their own terms.

Christopher puts together a powerful mixture of ideas from his experience building small businesses, startups, successful companies, and amazing customer service together with experience putting these ideas into practice in hundreds of law firms over the years. From this he delivers clear, concise and

Providing more “Access to Justice” is a great idea. It is necessary, for our society to remain healthy, that citizens believe they have access to dispute resolution, on a level playing field, where they can be fairly heard, no matter whom or what they are up against. For decades, bar Associations, law firms, and others have sought to achieve this by setting pro-bono goals, A2J clinics, paying into Legal Services, and more.

Chris is the host of “The Unbillable Hour” on the Legal Talk Network. He attended Cornell University and graduated with AB in Political Science. He received his JD from University of Georgia School of Law.

Marketing Planning

Reach Your Goals by Reaching the Right Clients

Presented by Sunnyside Services, Ltd.

“Helping Law Firm Owners Focus on What’s Important ... To Them”



Suffolk County
Bar Association

Who is This Guy?

Christopher T. Anderson

Entrepreneurial attorney
with a passion for helping lawyers define and achieve:

- **Greater Success**
- **Less Stress**
- **More Professional Satisfaction**
- **Joy**

So that they can **FOCUS** on what is Important ... to
THEM!



 **LawFirmBusiness**

 **LawFirmBusiness**

Everything I teach ... I DO!



Planning Marketing

Marketing Planning

A black and white photograph of General Dwight D. Eisenhower in military uniform, surrounded by soldiers. The quote "PLANS ARE NOTHING; PLANNING IS EVERYTHING." is overlaid in large, bold, white capital letters.

**“PLANS ARE NOTHING; PLANNING IS
EVERYTHING.”**

DWIGHT D. EISENHOWER

© Lifehack Quotes

HOW MANY PROSPECTS ?



You Are Not Ready to Answer That Yet



TOTAL OWNER BENEFIT

TOTAL OWNER BENEFIT

Everything the Owner Takes Out of the Business

Salary

+ Distributions

- Re-Investments

+ Perq's

= Total Owner Benefit



How Much Do You Want?

TOTAL OWNER BENEFIT

Everything the Owner Takes Out of the Business

Gross Revenues	\$1,000,000.00	
Owners Salary	\$125,000.00	
Owner Distributions	\$72,000	
Owner Investments	\$25,000	
All Other Perq's	\$28,000	
Total Owner Benefit	\$200,000.00	20%

The Beginning of a Plan



Gross Revenues	\$1,000,000.00	
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The Beginning of a Plan



	Annual	Monthly	Weekly
Total Owner Benefit	\$200,000	\$16,667	\$3,846
Planned TOB Margin	20%	20%	20%
Gross Revenues (TOB/TOB Margin)	\$1,000,000	\$83,333	\$19,231
Average Case Value	\$7,500	\$7,500	\$7,500
= # of New Cases Needed (NCN)	133	11	3
Historical Conversion Rate (HCR)	33%	33%	33%
Sales Calls Needed (SCN) = NCN/HCR	404	34	8

	Annual	Monthly	Weekly
Sales Calls Needed (SCN) = NCN/HCR	404	34	8

HOW MANY PROSPECTS ?



Now You Know!



The 2 Jobs of Marketing

THE 2 JOBS OF MARKETING

1. To **DELIVER** the

- RIGHT KIND of Prospect
- to the RIGHT PLACE
- at the RIGHT TIME
- in the RIGHT QUANTITY
- with the RIGHT EXPECTATIONS
- in the RIGHT FRAME OF MIND

THE 2 JOBS OF MARKETING

2. To **PROTECT**:

- Sales
- the Factory
- the People
- the Physical Plant
- the Money and Metrics
- and YOU

From Everyone Else!

COMMON MARKETING MISTAKES

Too Many New Client Prospects to Sales

Right Kinds of Clients at the Wrong Time

Right Clients, Right Time, Wrong Expectations
or Wrong Frame of Mind



“THE RIGHT KIND OF PROSPECT”

4 TYPES OF PROSPECTIVE NEW CLIENTS:

1. The True Believer
2. The Skeptic With Criteria
3. The Skeptic With No Criteria
4. The Naysayer

WHO DO YOU WANT?

Grade Your Clients

A

B

C

D

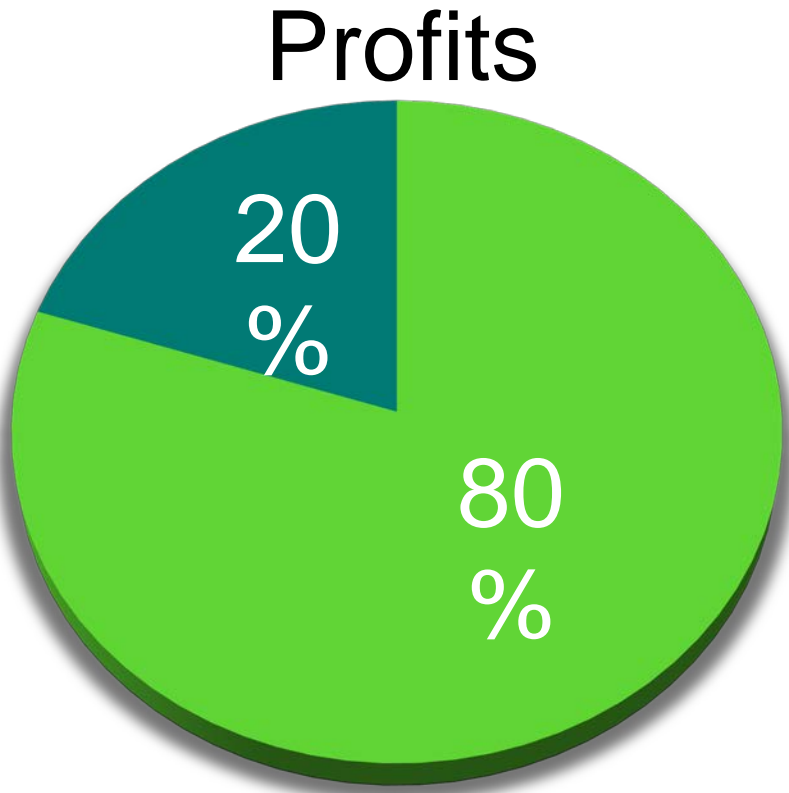
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Types of cases we take

Types of cases we don't take

WHO DO YOU WANT?

Grade Your Clients



A

B

C

D

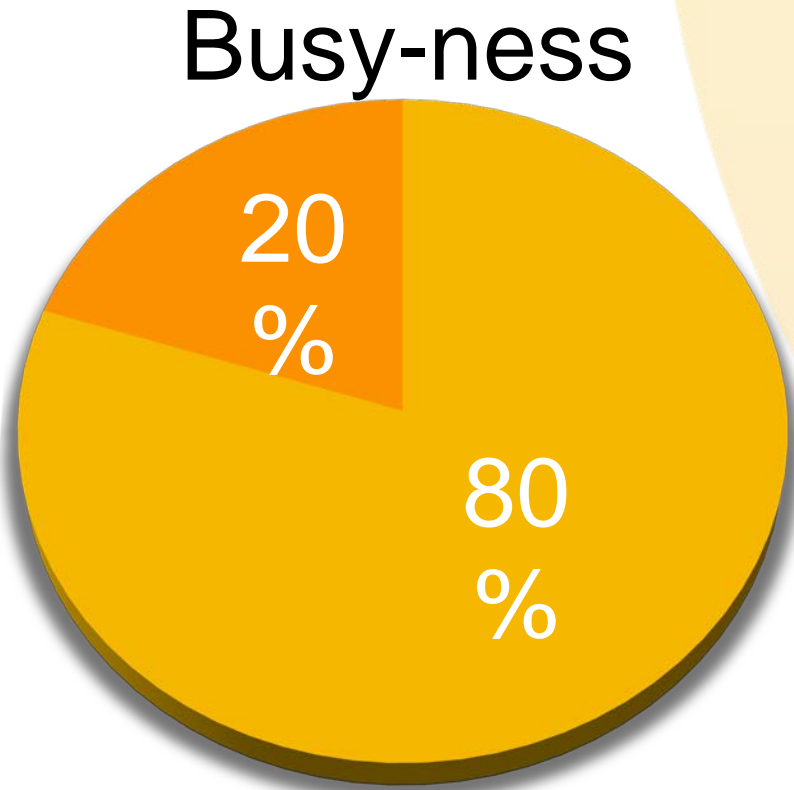
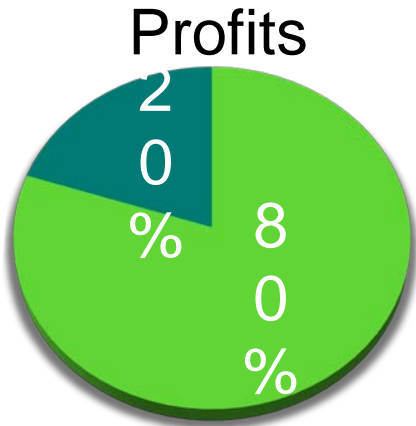
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Types of cases we take

Types of cases we don't take

WHO DO YOU WANT?

Grade Your Clients



A
B
C
D
F

Types of cases we take

Types of cases we don't take

BUILD A CLIENT PERSONA

LINDSEY



“Successful business person who enjoys adventure travel.”

Occup’n : Professional (Finance, Management)

Role : Junior VP

Demogs : Skews Male

Age 27-35

HH Income: \$125 - 225

Young children

Lindsey is a successful entrepreneur who strives to push the envelope in everything she does, at work, at home, and in travel. She is a young parent, and beginning to consider how her plans are consistent with her expectations for the childrens’ education, and her own retirement, young enough to let the adventure continue.

Background & Skills

- 5-10 years experience
- MBA or equivalent
- Advance Management Training
- Feeling used by the corporation, looking for something more

Motivations

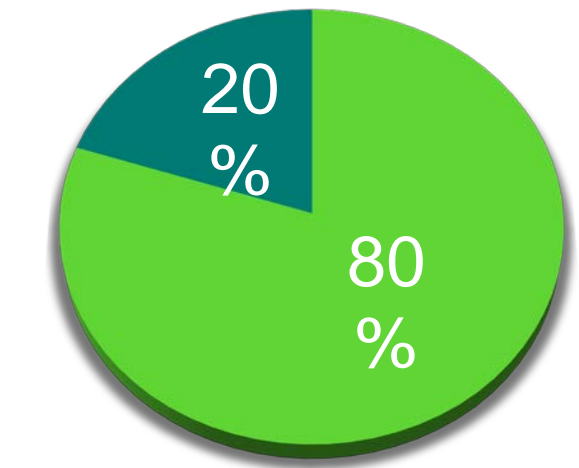
- Wants to be secure in income growth path
- Concerned about college costs for kids
- Wants to be more “present” in her life.
- Looking for more “meaning.”

Goals

- To have the freedom to make important changes.
- To secure retirement income by age 55.
- To have colleges fully funded by childrens’ 17th birthday.

Pain points

- Time is owned by current employment.
- “Golden Handcuffs” due to uncertainty.
- Inability to include family in wealth discussions



THE BEGINNING OF YOUR PLAN (REVIEW)



Gross Income to Owner(s) (You Decide This!)
÷ TOB Margin =
Gross Revenue Required (GRR)

Gross Revenue
÷ Average Case Value =
New Cases Needed (NCN)

New Cases Needed
÷ Expected Conversion Rate =
Prospects Needed (PN)

Marketing's Job is Defined by Gross Income to Owner!



Two Categories of Marketing

Two CATEGORIES OF MARKETING



1. Impression Marketing

- Print
- Social Media (Some)
- Billboards
- Radio
- Television
- Signage

Two CATEGORIES OF MARKETING



2. “Action” Marketing

- PPC
- Social Media (Some)
- Purchased Leads
- Lead Magnets

A Marketing Plan — “Impression Marketing”



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Historical Conversion Rate (HCR)	33%	33%	33%
Sales Calls Needed (SCN) = NCN/HCR	404	34	8
Funnel Conversion Rate (FCR)	0.5%	0.5%	0.5%
Exposures Needed = SCN/FCR	80,808	6,734	1,554



A Marketing Plan — “Action Marketing”



	Annual	Monthly	Weekly
Total Owner Benefit	\$200,000	\$16,667	\$3,846
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Historical Conversion Rate (HCR)	33%	33%	33%
Sales Calls Needed (SCN) = NCN/HCR	404	34	8
Funnel Conversion Rate (FCR)	5%	5%	5%
Actions/Clicks Needed = SCN/FCR	8,081	673	155

	Annual	Monthly	Weekly
Exposures Needed = SCN/FCR	80,808	6,734	1,554
Actions/Clicks Needed = SCN/FCR	8,081	673	155

HOW MANY
IMPRESSIONS OR
CLICKS ?



Now You Know!



Finishing the Marketing Plan

THE FIVE COMMANDMENTS OF MARKETING

THOU SHALT NOT ENGAGE IN ANY MARKETING ACTIVITY, UNLESS:

- I. YOU HAVE A **HYPOTHESIS** OF WHAT THE RESULT WILL BE (ROI)
- II. YOU HAVE A **CALL TO ACTION**
- III. YOU COMMIT TO **MEASURE** YOUR RESULTS AGAINST YOUR HYPOTHESIS
- IV. YOU COMMIT TO **LEARN** FROM YOUR MEASUREMENTS
- V. YOU COMMIT TO **TAKE ACTION** BASED ON WHAT YOU HAVE LEARNED

MARKETING CAMPAIGN

Every Campaign is a Funnel



	Campaign 1
CPM	
CPC	
Impresssions	
Click Rate	
“Click”	
Action Rate	
Action(s)	
Appointment Req. Rate	
(Screening)	
Screening Rate	
Set Appointment	
Show Up Rate	
Show Up	
Conversion Rate	
Buy	
CPA	

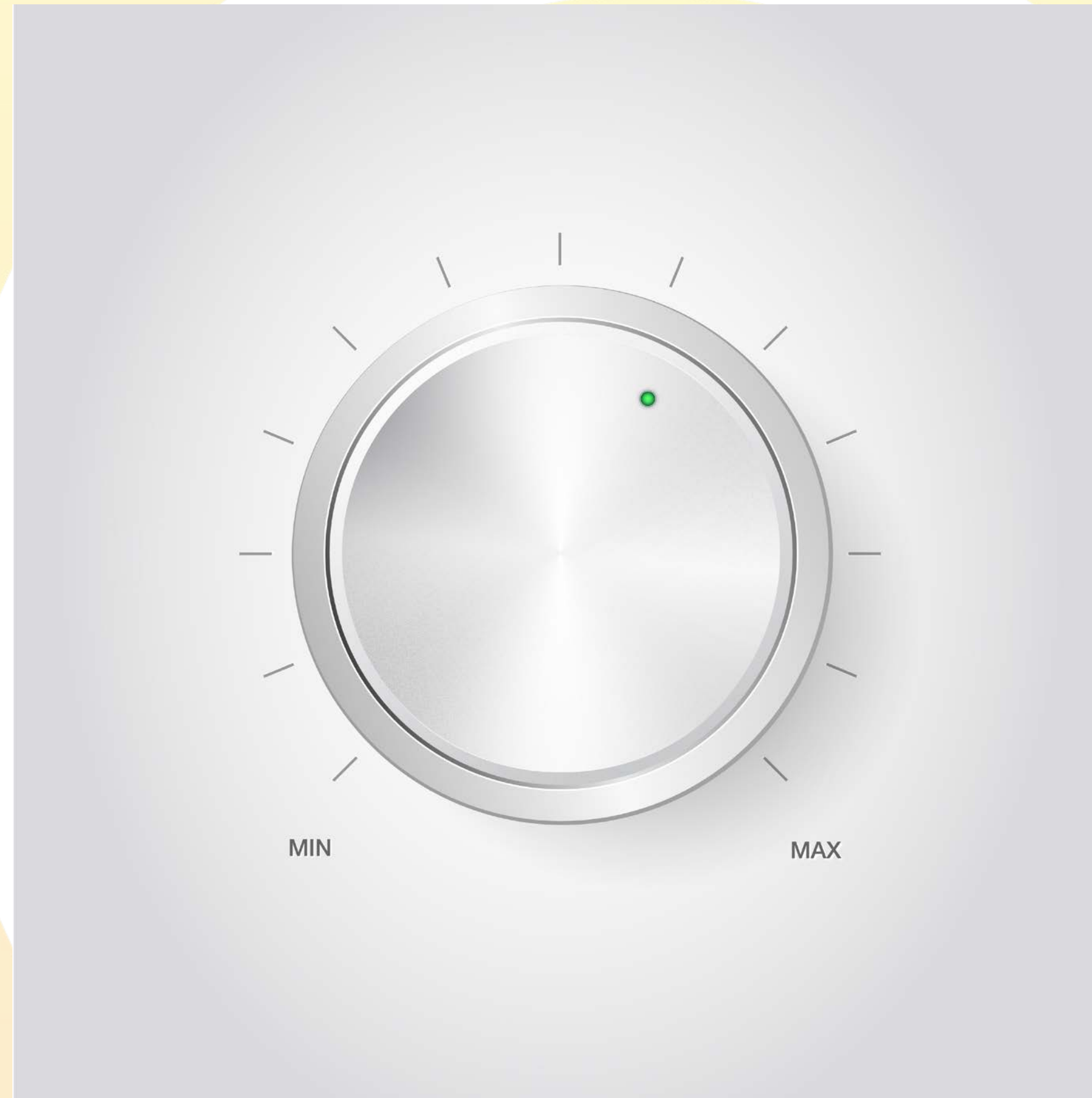
MARKETING CAMPAIGN

Every Campaign is a Funnel



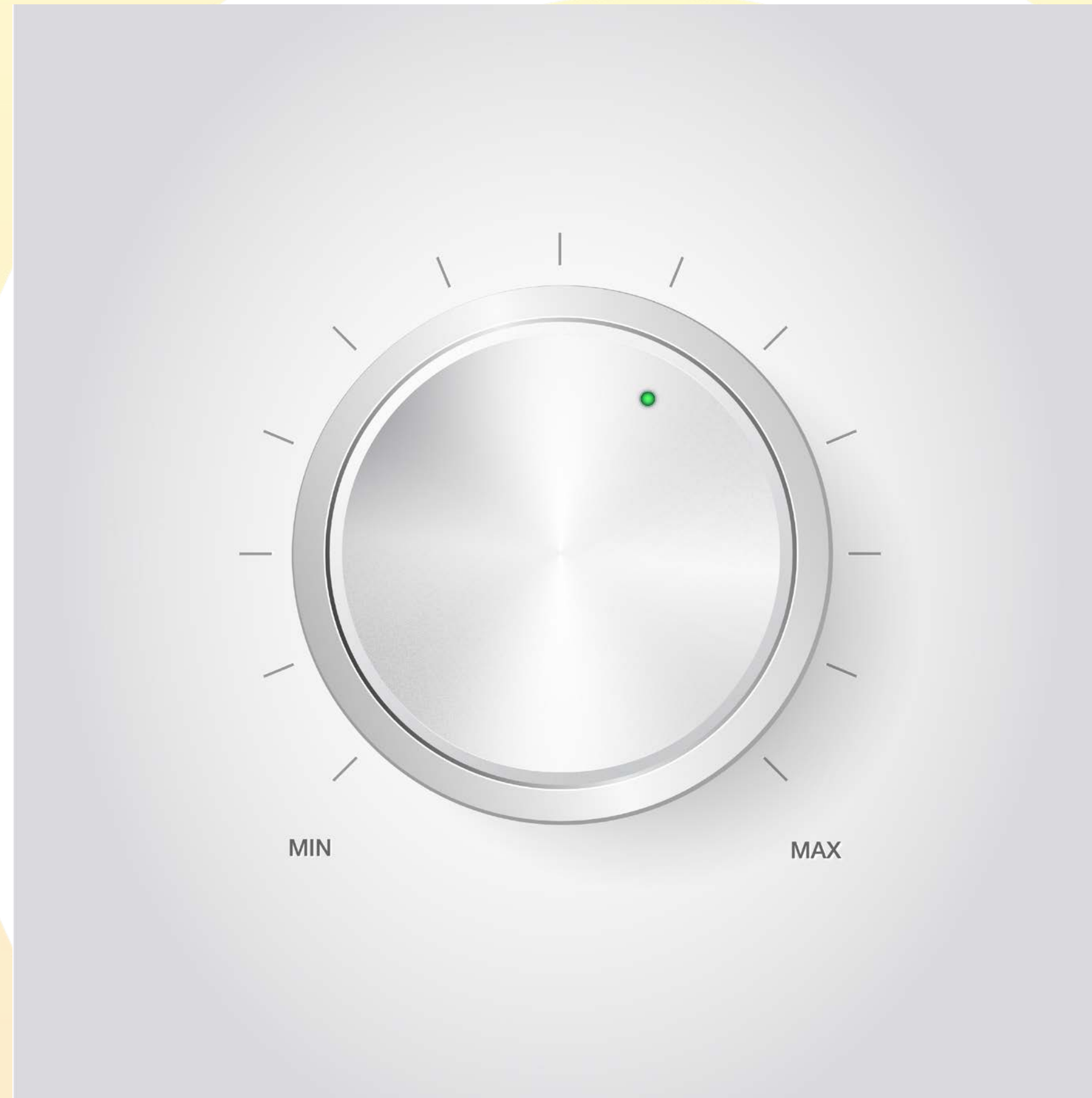
	PPC
CPM	
CPC	\$4.50
Impresssions	317,460
Click Rate	1%
“Click”	3,175
Action Rate	10%
Action(s)	317
Appointment Req. Rate	10%
(Screening)	32
Screening Rate	70%
Set Appointment	22
Show Up Rate	90%
Show Up	20
Conversion Rate	50%
Buy	10
CPA	\$1,429

MARKETING CAMPAIGN



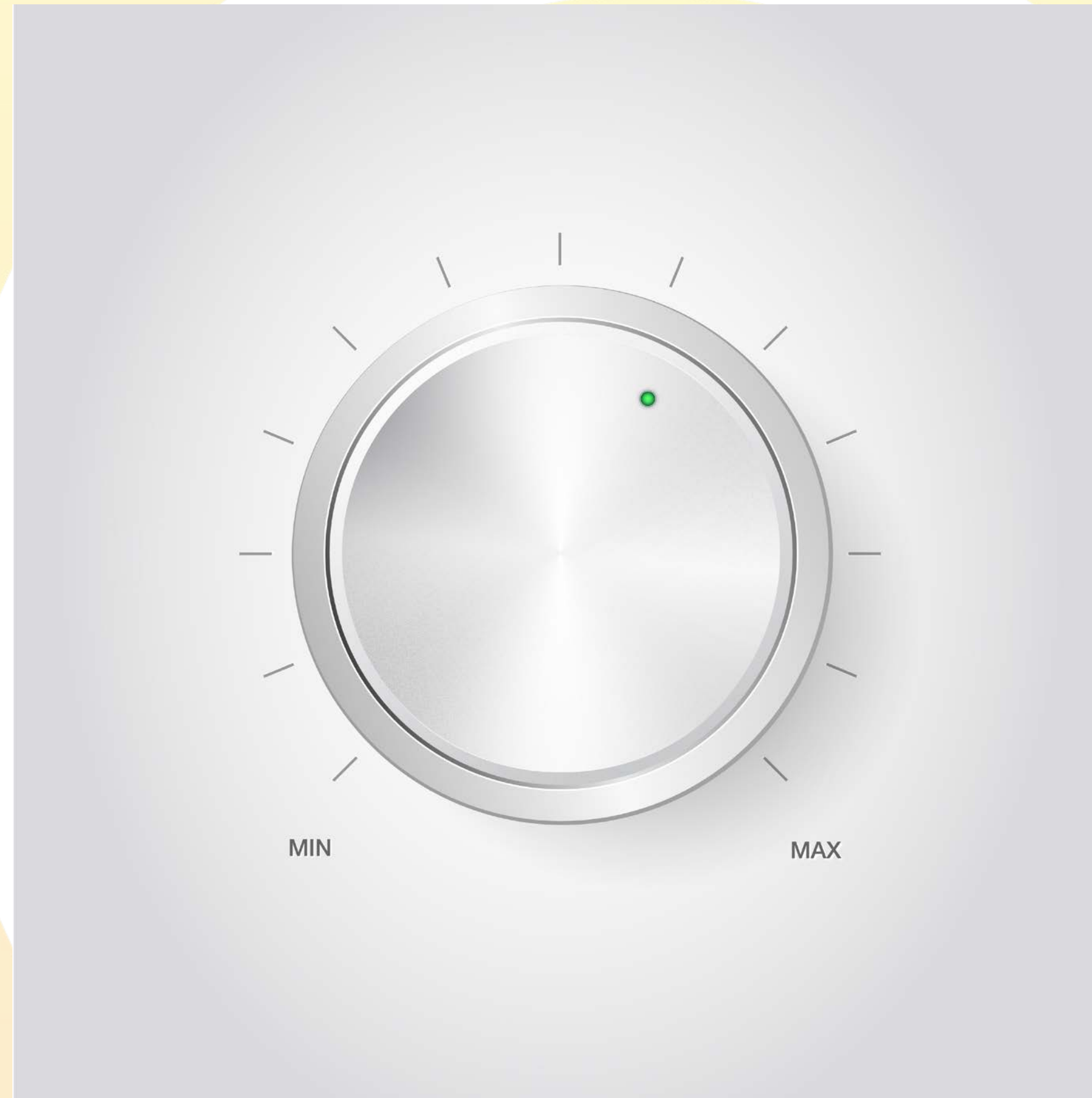
PAY PER CLICK

MARKETING CAMPAIGN



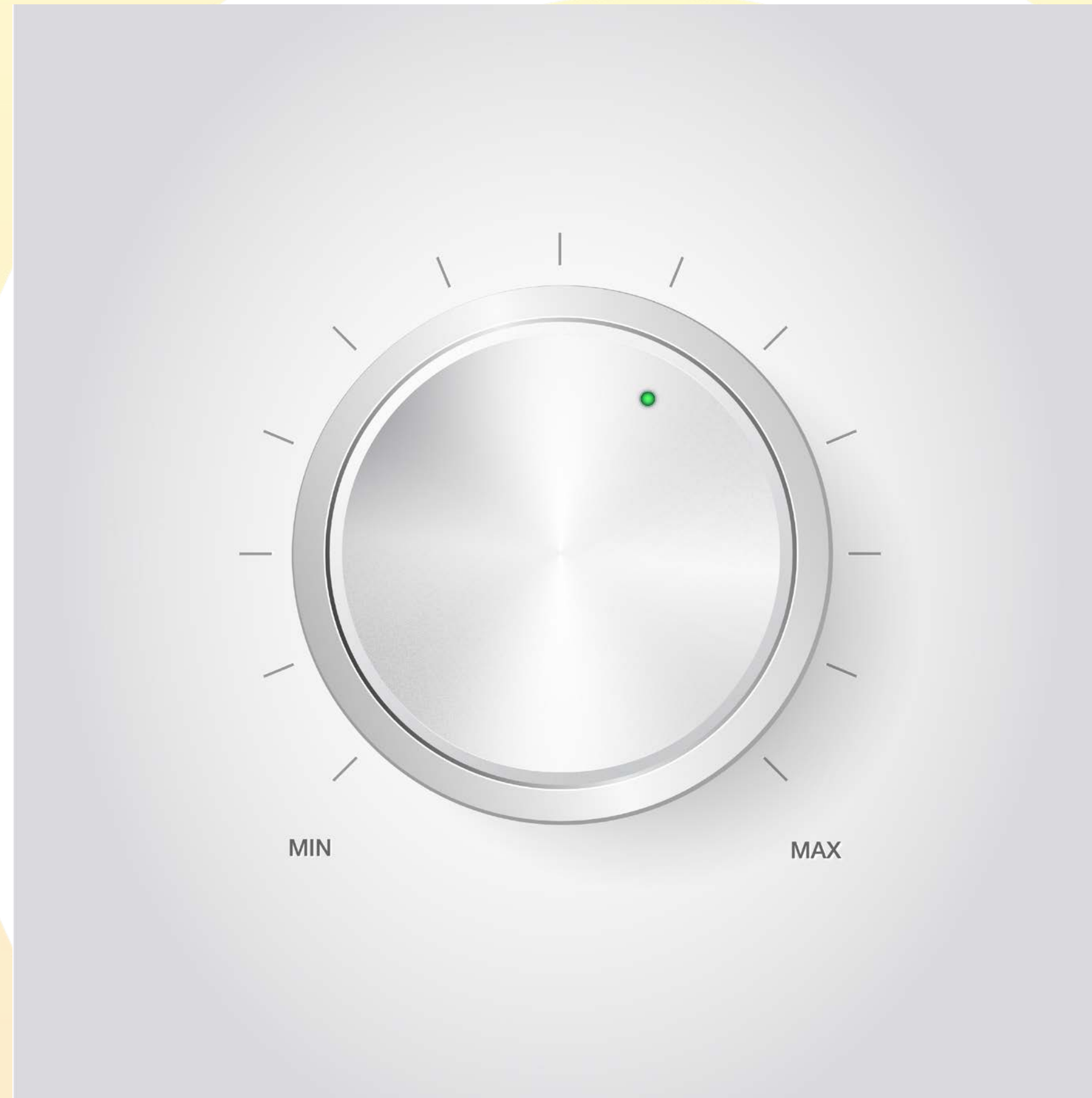
SOCIAL MEDIA

MARKETING CAMPAIGN



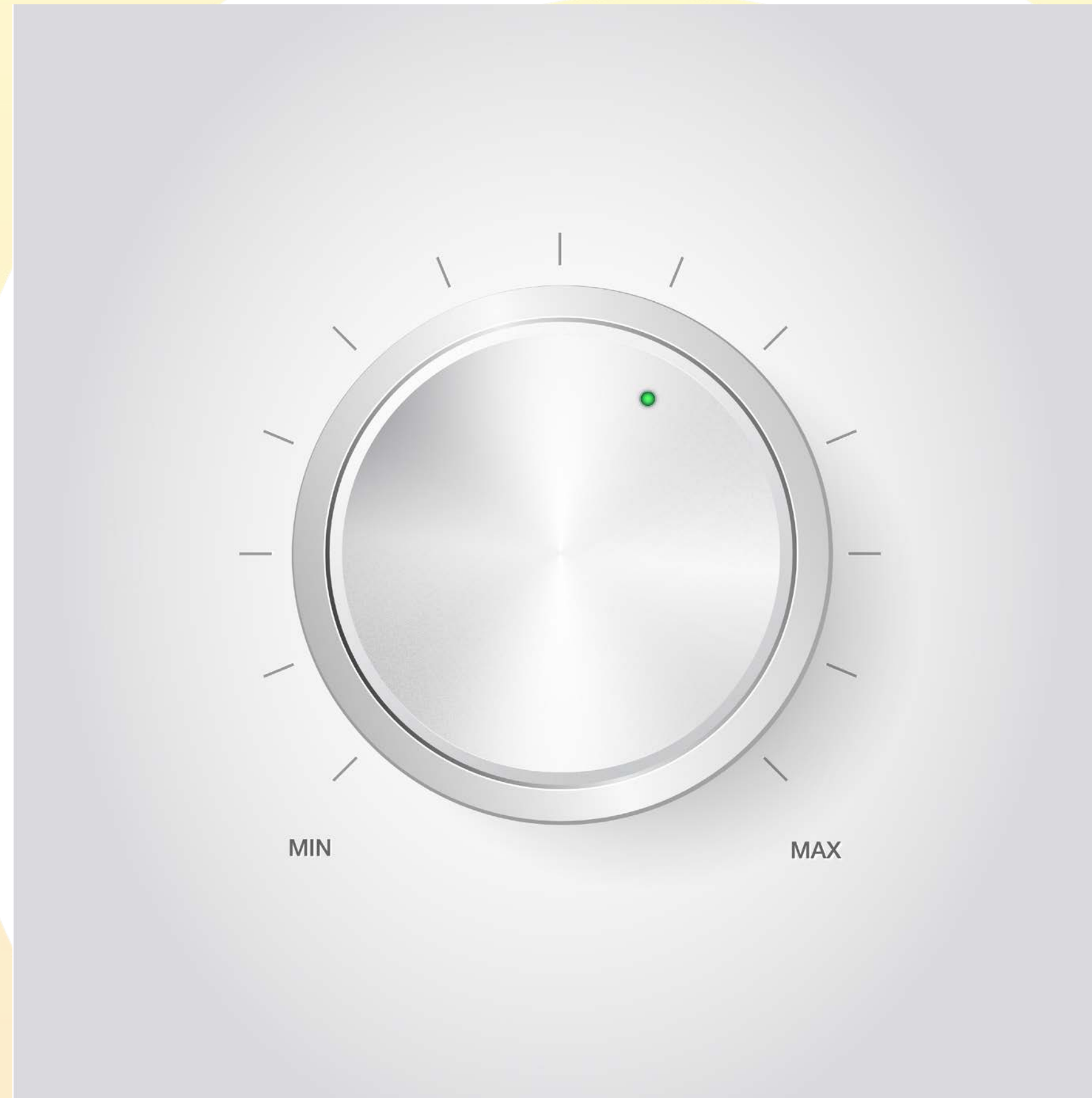
WEBSITE / SEO

MARKETING CAMPAIGN



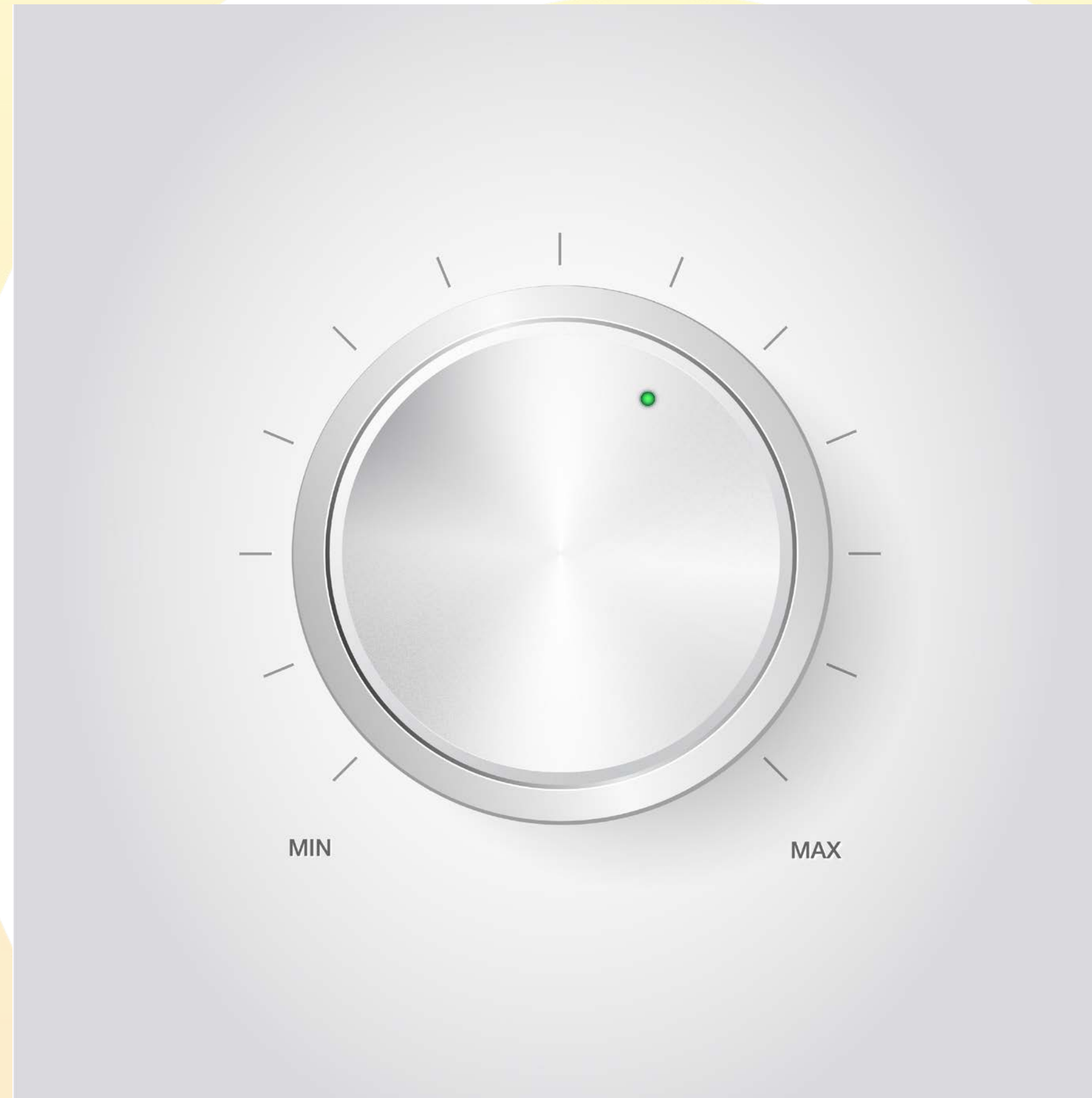
PRINT ADVERTISING

MARKETING CAMPAIGN



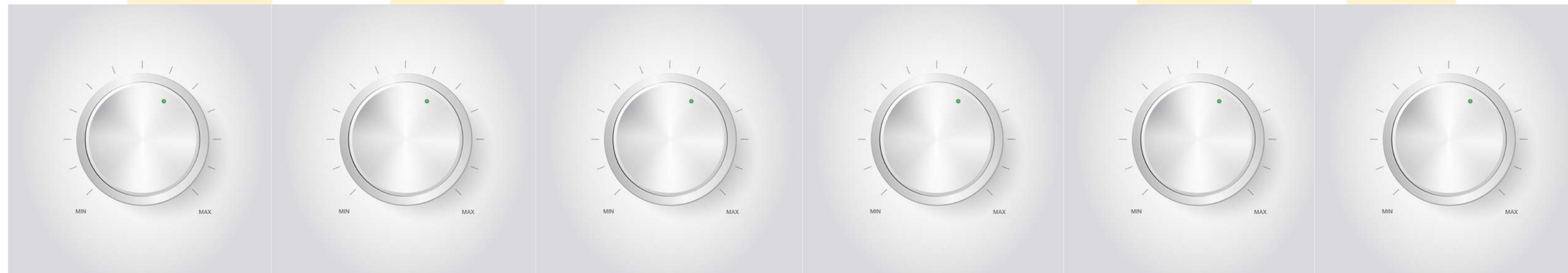
WORKSHOPS

MARKETING CAMPAIGN



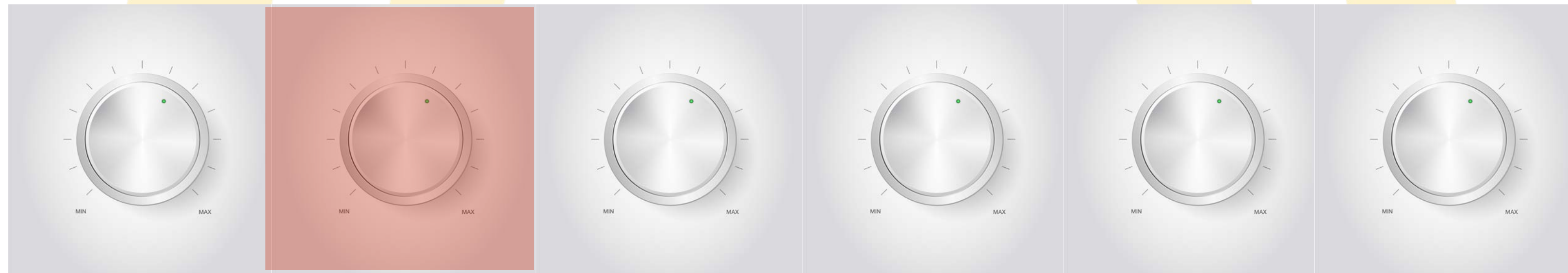
RADIO

MARKETING CAMPAIGN



PPC SOCIAL WEBSITE PRINT W'KSHOPS RADIO

WHAT TO DO WHEN ONE FAILS?



PPC SOCIAL WEBSITE PRINT W'KSHOPS RADIO

MARKETING PLAN

	December	January	February	March	April	May	June	July	August	September	October	November
Total Owner Benefit	\$16,667	\$17,000	\$17,340	\$17,687	\$18,041	\$18,402	\$18,770	\$19,145	\$19,528	\$19,919	\$20,317	\$20,723
Planned TOB Margin	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Gross Revenues (TOB/TOB Margin)	\$83,335	\$85,002	\$86,702	\$88,436	\$90,204	\$92,009	\$93,849	\$95,726	\$97,640	\$99,593	\$101,585	\$103,617
Average Case Value	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500
= # of New Cases Needed (NCN)	11	11	12	12	12	12	13	13	13	13	14	14
Historical Conversion Rate (HCR)	33%	33%	33%	33%	33%	33%	33%	33%	33%	33%	33%	33%
Sales Calls Needed (SCN) = NCN/HCR	34	34	35	36	36	37	38	39	39	40	41	42
Funnel Conversion Rate (FCR)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
Actions/Clicks Needed = SCN/FCR	673	687	701	715	729	744	758	774	789	805	821	837

MONTHLY
MARKETING
TACTICAL PLAN

	PPC Campaign	Facebook	Radio	Billboard
CPM			\$15.00	\$5.00
CPC	\$4.50	\$1.00		
Impresssions	317,460	4,409	48,611	312,500
Click Rate	1%	4%	0.5%	0.1%
“Click”	3,175	176	243	313
Action Rate	10%	40%	100%	100%
Action(s)	317	71	243	313
Appointment Req. Rate	10%	30%	30%	30%
(Screening)	32	21	73	94
Screening Rate	70%	70%	30%	30%
Set Appointment	22	15	22	28
Show Up Rate	90%	90%	80%	80%
Show Up	20	13	18	23
Conversion Rate	50%	60%	40%	40%
Buy	10	8	7	9
CPA	\$1,429	\$22	\$104	\$174

THE FIVE COMMANDMENTS OF MARKETING

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HYPOTHESIS

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Happy to Share: christopher@SunnysideLaw.com

Subject: Suffolk Bar Resources!



SUNNYSIDE SERVICES, LTD.



So What Happens Now?

www.sunnysidelaw.com/suffolk2022

HELP?:
Subject:

christopher@SunnysideLaw.com
SUFFOLK BAR HELP!

Resources:
Subject:

christopher@SunnysideLaw.com
SUFFOLK BAR Resources!

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