60 Ideas in 60 Minutes

Positioning Your Marketing Efforts

IDEA	DESCRIPTION
Sales and marketing – define roles	
Train partners and managers on how to get on same page with marketing	
ROI – ROI – ROI	Investment, Influence & Individuals
Define firm's sales process and clarify steps w/initiatives tied	
Define marketing time as investment time (not non-billable time)	
Integrate online and offline marketing	
Do a post-AAM report for partners	Take aways, personal opinion and how it will apply to your firm
Work harder on yourself than you do on your job	
Give partners more time to do their job – help them with what we can	
Apply for awards in practice areas/niches	
Demonstrate to partners that you want to understand the actual management of the firm (realization, utilization, etc.)	
Glossary of Marketing and BD Firms	For internal use at your firm
Is marketing right word? Marketing or is it education or BD?	
Marketing Blog	
Marketing Role to Marketing Relationships	
View partners as clients	
Communicate what marketing does to the partners	
Focus on what is most profitable FIRST	
Celebrate marketing results!	
Do you marketing meetings during tax season too	

Give annual report every year with objectives and value – back and forward	Partner meeting
Always set follow up plan	
Quantify your non-billable hours.	For a won engagement or all of them for the year—get a value per hour based on results generated
Take time to understand what makes each person tick and work with them. Power, affiliator, etc?	
Deepen client relationships by cross-selling	
Replace the word cross-selling with cross-servicing	
Thank your clients for their business	

Building a Marketing Function & Culture

IDEA	DESCRIPTION
CDs/audio video	
Share marketing tidbits that the partners can share w/their clients	
Be visible, verbal, fearless and don't hesitate	
Turn your admin into marketing ambassadors	Receptionist – Director of First Impressions
Work with those who will work with you. Don't waste your time on those who won't utilize you properly	
Define marketing responsibilities by staff level and have part of HR evaluation and core competencies	
Put ads up in the office so entire firm and guests see them	
Send all press coverage out via email or up on bulletin boards in office	
Remind employees of services – hand around the office – make posters, etc.	
Internal marketing fair w/booths – services	
Hold free monthly CPE seminars in your office for clients, COIs, etc. and alumni	
Take time to provide formal team building skills w/your team	
Publish monthly event calendar to whole firm	
Celebrate marketing with marketing banquet – lunch w/whole firm – acknowledgments	
Share key client metrics – rate per hour – give them tools for better realization	
Use hand written notes more often than email	
Logo wear store. Everyone gets $50 on their anniversary date to buy logo items	
Invite technical managers to attend recruiting events and tradeshows	
Packaging – how to you package to get partners to buy in	

Client promise – sits on everyone's desk – spells out promise – reminds us every day about what we are providing as far as service	
We should all be looking how to fit into our culture before we try to change it	
Always ask for a referral	
Weekly lunch and learns	
Start fostering marketing culture at staff level	
Put an internal brochure or communication together to communicate how marketing has helped internal clients	
Monday AM marketing memo – tips, reminders, ideas on how to market	Send it to everyone
Put incentive programs in place for staff to participate in marketing activities	Small rewards to motivate
Set the expectations with staff on what you want them to do and reward to motivate them	All levels, no?
Peer pressure is a great motivator	Training program – people want to be a part of success
Client retention is 10 touches a year	*Paddle smacks* per Sean
Rewards for activities not just wins	
Fear is also a good motivator – send ads and letters from other firms.	They are sending to your clients.
Ask partners what they have done that month to train and develop staff	And report on it…
Send out a list of networking events of who went where	More peer pressure and credit
Ask really good questions --- more info is better	
Teach younger staff what the firm is all about	Scavenger hunts – what clients want, what services we offer, - then they present to others.
Internal task forces comprised of younger professionals to get them involved Make them apply – make it exclusive	
Study and understand realization rates	
Make marketing fun and colorful	Make people want to be around the marketing team
Try to bring a partner with you to the conference	
Bring CDs back for lunch and learn	
Quantify client service standards	Use as screen savers
Client service philosophy	
Policy to encourage people to attend social events – pick up clothing cost (tux? fancy dress? Nice!)	
Ban the word BUSY. Penalize for it. Say, "Business is great, and we are looking for more.	A la Kris Frederickson
Train on dining etiquette/manners	
Share of list of new clients, who lead the lead team (pursuit team), why we were selected and how long the process took	

Generating External Awareness & Exposure

IDEA	DESCRIPTION
Hosting events – get people into the office	
Instead of referral events – relationship events	
Private equity groups are the new banks and boutique law firms are the new law referrals. Network with them!	
Strategically select community and charitable organizations that you want your folks to be involved with	
Make donation to charity of choice of referral source who refers several leads	
Think current clients first – not just prospects and new client leads	
Be willing to get on the phone w/reporters to pitch bigger ideas – not just your firm – pitch the experts for that topic – not just your people, but the competition as well	
Be more differentiating and less commodity. Go more specific and less generic.	
Develop your own relationships and leverage them – other professional service marketers, press, etc.	
Think about byproducts when thinking about topics for blogposts, etc.	
Develop and utilize your advisory board members. Advisory board = local university members, not for profit leaders, industry leaders in the community that are parallel to your service lines	
Get your events posted on community bulletin boards and on the Chamber list	
Set up Google Alerts for partners for top clients and prospects	
Formalize your channels of distribution. Know specifically where you need to go with service and messaging.	
Leverage your CPA firm association and use it to develop opportunities	
Encourage your YPs to get involved in YP associations. If you don't have one in your area – develop one!	
Keep website brief. No more than 400 words per page.	
Invite the media to your events.	
Be a connector. Not always about your services necessarily but they'll come back around.	
Keep PowerPoints simple and brief. Use a photo instead of words.	
Go on sales calls with the partners so you can hear what they are saying and	

you can hear what they don't.	
Have vision, mission and core values visible on presentations, website, proposals, hung in lobby and/or around office	
Utilize your clients as brand and/or service ambassadors	
Form user groups and sponsor their meetings in your office	
Use referral sources to spread the word and don't be afraid to ask for the introduction.	
Promote all events through all social media, include presentations	
Everyone in the firm should comment on other blogs to link back to us	
Brand handbook to make sure everyone's on the same page.	
Encourage partners to eat with an influencer once a week	
Display direct mail and other campaigns to show what you are doing both internally and externally	
Create relationships with press in industry and niches	
Establish a social media policy	
Lead by example – learn to use social media yourself	
Create marketing blog	
Encourage partners to write articles in industry niches	
Focus on them, not on "us."	
Write case studies on client engagements and successful projects	And use them
Partner with local or state industry org to sponsor an award	
Social media is a platform for developing relationships	It's not just about technology
Do an internal business book club	Include referral sources and/or clients in the book club
Offer to create or lead an advisory board for your clients	
Team with local colleges – partner or sponsor panel discussions or roundtables	
Partner with small biz dev centers in local areas to reach out to emerging businesses	Provide workshops, literature and educational materials
Include a case study with all proposals	In addition to references
Be creative with your training – include referral sources	Work together – how to refer clients to each other and define what kind of clients you want
Be a connector	
Use video on website or elsewhere	
Graphics increase persuasiveness – Use graphics!	47% increase
Make sure that the marketing department reviews and approves all firm output	PowerPoint etc. Police firm output so you know it is consistent with firm brand
Be a part of sales calls – coach and/or go along	

80% of proposal should be YOU, only 20% on you. And reverse the order.	
Create a process for cold inquiries that come into the office – let everyone know what to do and who gets the call.	And who the back ups are and in what order
Provide social media training to staff so they correctly relay the firm message	
Update your LinkedIn page daily	
Offer free educational workshops by industry open to the public	
Cross market everything you do- get the best bang for your work	
Use webinars	

Winning New Business

IDEA	DESCRIPTION
Create sales team to make sure we have the right people going out to prospect.	
Ask for a referral immediately following a compliment from them.	
Identify exact needs from the buyer. Be very specific about what their pain is.	
Make sure you ASK for the business.	
Hold alumni events. Keep alumni engaged and informed.	
Create a robust tool kit for admin, etc. so they know where to find the key messages.	
Follow up	
Graphics are powerful. If words can be translated into a graphic, use a graphic.	
Don’t give up on lost proposals. Follow up on them to check in on how it went with the winner.	
Ask your clients for leads. Encourage and train the partners on how to do that.	
Ask your top clients to call the prospect and put in a good word for you.	
Include ads for your services in your newsletters.	
Contact your lost business to follow up on how it’s going with new service provider.	
Get competitors’ proposals from your clients who have gone out to bid.	
7-10 from hello to yes. Be persistent.	
Send out a “who knows who” to the entire firm. Don’t limit it to the partner/senior leadership group.	
Profile clients in the newsletters.	
Integrate marketing and sales	
Reach out to your AAM friends!	
Keep track of your losses and know why you lost the business.	
On sight = insight. Get to know the gatekeepers at client offices. They’ll talk!	

Reinforce the concept that everyone you meet is a prospect, referral source.	
Elevator speech – teach the person to make a statement that enlists a question back from the person with whom they are speaking.	
Pick up cues on how buyers are going to make a decision.	
Create value on every client encounter	
Include testimonials in your proposals	
In testimonials, mention savings or successes	
Make sure team members are well prepared for new biz meeting – give them everything you can to help – coach, practice	
Emphasize the importance of face time w clients	
Monthly pipeline meeting— celebrate successes and share to work together	
Do not write a proposal if you don't have to.	
Send more than one person to every meeting	Work with each other to make it the best it can be.
If you lose proposal, don't give up – follow up.	
Sales structure	
Pipeline report has goals and status for each partner	
Include ads for services for newsletters	
Put a pursuit book together for whole team	
More business from existing clients – ask for it.	
Someone's dead lead could be your live lead	
Use CRM systems effectively to make sure you are leveraging relationships	
Define your sales process – what are the steps in the pursuit process?	
Prepare full SWOT analysis on clients and prospects	
Track lost business and study trends or info	What could you do better? When will the opportunity happen again? Follow up.
Know your win rates when the process is followed and when it is not.	
Be a good listener – listen to your prospects	Set up Google alerts
Listening skills training	
Invest in reducing fees if need be – key accounts	
If you cut fees, get something back-negotiate a sponsorship or some other add back for your firm	
No does not mean never	
Equip everyone with an elevator pitch to describe firm and the value	Role play - practice
Elevator pitch contest by niche or practice area	
Pick up cues on how buyer is going to make the buying decision	Ask questions
Every change is a potential opportunity	

Lightening Round

We are smart, beautiful, and we can do anything! You are and you have! Great job!
Don’t be an order taker – be an idea generator
Any type of marketing without the intent of selling is not worth it
Social media is not a concept. It’s a tool
Too much ROI