

This Week in Marketing

Date: _____

Periodic

	Mon.	Tues.	Wed.	Thurs.	Fri.	Week	Month	Other						
Make an "A" List call ¹	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
Have a marketing lunch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
Have a marketing lunch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
Call a "Client's Other Professional" ²									<input type="checkbox"/>					
Visit a client's place of business									<input type="checkbox"/>					
"How are we doing?" ³									<input type="checkbox"/>					
Civic organization meeting									<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	
Charitable organization meeting									<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	
Trade association meeting									<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	
Bar or professional organization meeting									<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	
Write an article for publication									<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	
Prepare a seminar presentation									<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	
									<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

New Client or New Matter

Client expectations ⁴	<input type="checkbox"/>	_____
Client legal needs ⁵	<input type="checkbox"/>	_____
Cross-selling ²	<input type="checkbox"/>	_____
Client's other professionals ⁶	<input type="checkbox"/>	_____
Thank referral source	<input type="checkbox"/>	_____
	<input type="checkbox"/>	_____

Other

Post-matter referral source thanks	<input type="checkbox"/>	_____
<i>Pro bono</i> legal work	<input type="checkbox"/>	_____
Recruiting — name of potential hire	<input type="checkbox"/>	_____
	<input type="checkbox"/>	_____

¹ From your list of 25-30 known or potential referral sources, prospective clients, existing clients, professional contacts

² Ask client to identify his/her other professional advisors (attorneys, CPA, banker, insurance agent, etc.) for future contact

³ Initiate a discussion of client's satisfaction with our service.

⁴ Discuss client's expectations for a new matter: time, cost, communication, outcome, process, etc.

⁵ Initiate a discussion of a client's other legal needs; make internal introductions as appropriate.

⁶ Ask client to identify his/her other professional advisors (attorneys, CPA, banker, insurance agent, etc.) for future contact.