

# Marketing Automation Tools Level the Playing Field

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- *Marketing Automation Tools Level the Playing Field*



As a solo lawyer or member of a small firm you already wear many hats: rainmaker, administrator, filing clerk, accountant and, of course, practicing attorney. You think, “I have no time to add another responsibility. I don’t need marketing. I have clients.”

Your “note to self” is understandable but wrong. Everyone needs to market their services in order to be found. Potential clients need to be able to locate you in order to vet you before they make contact or to validate their choice after they have chosen you to be their advocate. Potential referral sources need to know you and trust you.

In today’s “new normal” people are feeling isolated, facing uncertainty for an unknown length of time. Desperate to connect, people are turning to social media and virtual conferencing as a substitute for in-person connections. Online has become the go-to place for entertainment, conversation with friends, shopping and education. Now is the perfect time for you to become part of your clients’ and prospects’ online conversations.

Professionals need to be visible in person through networking and visible online through their website and activities on social media sites. You should have a coordinated, continuous, targeted presence in both worlds. According to the ABA's LTRC 2019 Legal Technology Survey Report, most solos and small firms don't practice this kind of strategic marketing. Sixty percent of solos do their own marketing, 30% don't market at all. Those who do usually don't have a marketing plan or budget. Their efforts are mostly sporadic because marketing can be time-consuming when done correctly as a planned, targeted, goal-oriented sequence of activities.

For those who know it is important and want to do it better, technology provides software, like marketing automation systems, that can help. Marketing automation is an umbrella term for a host of applications that, as explained by HubSpot, "automate marketing activities under a single digital roof like blog hosting, email marketing, landing pages, lead collection forms, automatic email workflows, social media publishing and scheduling, and so on."

These programs can be as simple as just using Microsoft's Outlook, Calendar and To-Do List apps together or as complex as Salesforce's system. NYSBA's Committee on Technology and the Legal Profession and the ABA's Legal Technology Resource Center (LTRC) offer articles and assessments about specific products.

In this article we look at some of the technology tools that can help you be more effective and efficient in marketing to clients and at some of the preparations you should make before selecting any digital assists.

### **Begin by Assessing What You Have**

New technology will have to meld into your current technology setup. So, first you will need to make a list of all your current technology. You need to budget for training time so that all the users can get the most out of the technology additions. And, of course, you need to factor both time and money costs into your growth strategy and budget. The good news is that many marketing automation systems have basic packages that are free. Often these are perfectly suited to the solo lawyer's or small firm's needs.

You need to answer **marketing questions** related to your audience and the results you want.

- What are your marketing goals?
  - Do you want people to go to your website?
  - Do you want help with content creation or ad targeting or analysis of leads?
  - Do you want metrics and analysis of your social media presence?
- What/who are your communications targets? Targets could be a subset of your clients or prospects, a practice area, geographic location, specific industry or service, or specific action triggers such as illness, accident or a business crisis.
- On which social media sites do you plan to participate and share content?

- What are the marketing activities you perform currently? Do you send regular information emails, blog, write thought leader pieces? Do you use infographics, newsletters, videos, podcasts, webinars? Do you have a website?

### **Questions to Ask Before Purchase**

As you begin to review the myriad available technology tools, you need to ask:

- Will the software fit my needs?
- Will it synch with my other software?
- How much can it be customized to my kind of client?
- Is it easy to learn? Easy to use?

### **Client-Facing Technology**

You might want to begin with client-focused technology because law firm success is built on client relationships. These relationships need to be cultivated. Clients need to feel that their lawyer knows them, understands them and connects whenever something relevant to them comes to the attention of the lawyer. This kind of attention can be difficult to track and implement. Current client needs tend to blot out past clients' concerns. Technology can help you produce personalized targeted content and track each client's reaction to it.

Client Relationship Management (CRM) software can help you remember what clients want and schedule client interactions such as meetings, blog posts, emails, etc. According to Wikipedia, "Customer relationship management (CRM) is one of many different approaches that allow a company to manage and analyze its own interactions with its past, current and potential customers. It uses data analysis about customers' history with a company to improve business relationships with customers, specifically focusing on customer retention . . . ."

At its most basic level a CRM is an expanded email contacts list – think Microsoft's Outlook. At its most elaborate it is integrated into a 360° marketing automation system that manages, tracks, analyzes and reports on every aspect of your marketing, sales and client-service activities. Many of the legal practice management software packages have a CRM component. There are also standalone CRMs designed specifically for law firms.

### **Task-Oriented Technology Solutions**

If a CRM sounds too overwhelming, consider adding task-specific apps. For example,

- Email and text communication software can customize mailings by adding touches such as the recipient's first name. It can handle scheduling and also track and analyze recipients' responses to each communication.
- Virtual assistants/receptionists for your office or your website or both can be empowered to screen prospects and schedule new client interviews.
- Chatbots can answer basic consumer questions while people are in the lawyer research stage.

- AI can be used to create interactive questionnaires.
- Apps can simplify service to smartphone users by managing text message dialogue – sending appointment reminders, retaining important messages, etc.
- Apps can help you make your website mobile friendly by adding immediate online scheduling, AI assisted contact information forms and voice-activated search.

These ideas are just the tip of the technology helper iceberg. The wide variety of options available for every skill level and every client service or client interface opportunity means that there is no excuse for busy lawyers to ignore marketing because they don't have time. By saving time with technology, any lawyer can plan a structured program to reach the connections they care about with appropriate content.

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**Carol Schiro Greenwald, Ph.D.** is a marketing and management strategist, trainer and coach. She works with professionals and professional service firms to structure and implement growth programs that are targeted, strategic and practical. Her book, *Strategic Networking for Introverts, Extroverts and Everyone In-between* (Law Practice Division, American Bar Association, January 2019) provides a training and coaching guide for linking networking activities with both personal and firm goals. Her book, *Build Your Practice the Logical Way – Maximize Your Client Relationships* (with Steven Skyles-Mulligan, American Bar Association, 2012) provides a guide to creating a client-centric practice. The result is a firm differentiated from the competition by its client-centric core and the ability to attract and keep better clients.

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