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How to Magnetically Attract All the Prospects You Can Handle with Education-Based Marketing that Turns You into the Expert in Your Field and Eliminates Any Competition While Still Promoting to Your Own Clients.

**Friday, October 16, 2009
9:30 a.m. - 10:45 a.m.**

**2009 Fall Meeting and
National Solo and Small Firm Conference
October 16 - 17, 2009
Millennium Biltmore Hotel
Los Angeles, CA**

Alexis Martin Neely



There are few people who possess the leadership skills to inspire others. There are even fewer people who are willing to combine action with leadership in order to take new ideas and make them a reality.

Alexis Martin Neely is exactly that kind of person. As founder of the groundbreaking Family Wealth Planning Institute, Alexis has created a unique resource that is revolutionizing the way personal legal services are provided to families and small business owners in the world today.

Alexis began her career at the prestigious law firm of Munger, Tolles & Olson and left after only three years to start her own law firm, Martin Neely & Associates, when she recognized that the hourly billing model of the traditional lawyer didn't match up with her dream of creating a personal relationship with her clients.

After only a short time in practice on her own, Alexis had what she now calls an epiphany when she recognized that everything about the traditional business model of the small firm lawyer was broken.

She then set out to create a whole new business model that left behind hourly billing and focused on proactive ongoing communication with clients and a revolutionary membership model for ongoing service. Within just three years, Alexis had built an annual revenue of more than a million dollars per year in her small firm.

In late 2006, Alexis began teaching these principles to other lawyers through the Family Wealth Planning Institute and has now created a network of lawyers that is providing families and small business owners in the United States with affordable access to their own long-term relationship with a personal lawyer.

Today, she also coaches small law firm owners on how to integrate education-based, relationship marketing into their law firms and coaches professional business owners on how to go from one to one client service to becoming the go to expert in their industry so they can go part time or retire within 3-5 years.

As America's Personal Family Lawyer® and the author of the best-selling how-to legal planning book for parents (*Wear Clean Underwear: A Fast, Fun, Friendly – and Essential Guide to Legal Planning for Busy Parents*), Alexis is recognized nationwide as a legal expert. She has been named by *Worth Magazine* as one of America's top 100 lawyers, has appeared on the TODAY show and is a regular on CNBC's *On the Money*. She is also the Family Financial and Legal Expert on Better TV and is frequently quoted in magazines and newspapers throughout the US.

Lawrence Silber



Lawrence Silber was called to the Bar in the province of Ontario Bar in 1986, and specializes in corporate/commercial law with particular expertise in income tax, estate and succession planning. He advises clients on a broad range of business matters and practices residential and commercial real estate.

Lawrence Silber deals extensively with families in business together in order to provide a comprehensive solution to difficulties that arise in family businesses trying to balance family and business.

Lawrence Silber has been an instructor in the Business Law section of the Ontario Bar Admission Course. He currently teaches real property law for the Ontario Real Estate Association and lectures frequently on wills and estate matters. Lawrence is a member of several tax and estate planning-related professional organizations, including the Society of Trust and Estate Practitioners, Ottawa Estate Planning Council and Canadian Association of Family Enterprises, where he is on the Board of Directors. He offers his knowledge and wealth of experience as the co-chair of the Solicitors Conference for the Carleton County Law Association, frequently contributing articles to the conference. He is also a member of the Taxation, Business, Real Property, Trust and Estate Law sections of the American Bar Association.

Lawrence Silber volunteers his time with several community organizations, and has served on several boards, including, Habitat for Humanity — National Capital Region, Canadian Mothercraft of Ottawa-Carleton and the Canadian Tulip Festival.

Lawrence Silber earned both his civil and common law degrees (B.C.L. and LL.B) from McGill University in Montreal, Canada.

Turn Your Fear into Faith - Holiday Call Transcript

Alexis: Hi everyone and welcome, this is Alexis Martin Neely and I'm here today with Dave Dee and this is the 2008 Family Wealth Planning Institute Law Business Secrets turn your fear into faith holiday call.

The purpose of today's call is to help you transform any fear that you're currently feeling about the economy, about your business, about client attraction and marketing into faith. That 2009 will be the best year you've had for your business yet.

Now as I mentioned in the information I sent out about today's call, I will not be selling anything at all on the call today. You don't have to wait until the end of the call to see how much something is going to cost you because there is no something else. This call is 100% my gift to you.

Now you should stay on until the end of the call because I'm giving out some great content here and you will not want to miss a single thing. Make sure you have a pen and some paper ready so you can take notes. I'm doing this because I know that a lot of you are concerned about the economy and you're feeling the urge to pull back your marketing, to pull back your resources, to pull back on taking the risks that you need to take as a business owner.

You can absolutely do that but if you do you're actually putting your business at more risk. The best thing you can do right now is do what everybody else is not doing. The truly successful wealthiest people make up less than 5% of the population of the world. Do you think they got that way by following the crowd or do you think they got that way by breaking free and doing something totally different?

Of course statistics alone tell us they got there by going against the crowd and this is your chance to do the same thing. Now that takes faith and that is what we're going to be talking about today. How you can have the faith to go against the grain and make 2009 your best year yet.

With me today is my personal marketing mentor, the man who has helped me buck the trend in marketing more than anyone else and that is Dave Dee. Hi Dave, welcome.

Dave: Hi Alexis and thank you for having me on the call.

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Alexis: Dave you've been a student of Dan Kennedy's for over 10 years. What would you say the single most important thing that you learned from Dan? And for people who don't know who Dan Kennedy is, he's a marketing mentor of both of ours, someone who has taught us a lot of things. What would you say is the most important thing you learned from Dan over these years?

Dave: There are a number of things I learned from Dan but I think the first thing is and one of the most important things is that everyone is in the same business and that is the business of marketing.

I remember him at a seminar Alexis offering \$100, he took \$100 out of his wallet and he said okay I want you to tell me what business you're in and when you can tell me what business you're in I'll give you this \$100. Of course the lawyer said I'm a lawyer; the magicians like me said we're magicians; and so on and so forth. He said no you're all wrong; you're all in the business of marketing.

The thing I always teach is marketing is marketing is marketing and it doesn't matter what you're doing. The basic fundamental principles remain exactly the same.

Alexis: That was a huge shift in my thinking as well. In fact, it is something that is a huge issue in the legal field. I recently saw an email and you would think this would have gone away by now but no I recently saw a thread on a legal website debating whether lawyers should be marketing. I was shocked that this is still a question for people. Then I talked with a lawyer friend of mine, he's my entertainment lawyer actually and guess how I found him? I found him on Twitter.

For those of you who don't know what Twitter is check out [Twitter.com](https://twitter.com) and make sure you're following me at [Twitter.com/alexisneely](https://twitter.com/alexisneely) and I'll be interviewing this lawyer in fact in early 2009 because he's gotten 20 new clients from Twitter in 2008. So you really want to hear how he's done that.

Anyway, what we were talking about was how great he's doing with his marketing. He's doing so well, even in this economy that he's expanding his firm and he's shocked at the resumes he's getting. Harvard graduates, Columbia graduates, NYU graduates and he's shocked because he's like why are these people having to apply for jobs with me? Why can't they start their own business? What they don't know how to do is market. And they don't know how to get clients and so they have to go work for someone else because if you don't know how to market your business will not survive.

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You can be the best lawyer in the world but if you cannot reach your clients, you need to go work for someone else just like these Harvard grads are, just like these Columbia and NYU grads are because that is what it's all about.

So now that we got that out of the way, let's talk about the other most important thing that you learned from Dan. What was that?

Dave: Yeah let me just take you back on what you said very quickly though. It's critical and here is the reality and no one wants to hear the reality Alexis but the reality is the best lawyer does not win. Now maybe that's not fair but that's the way it is. The best marketer wins, period. Now I'm not saying you don't have to deliver good service, of course you do but being the best is not a competitive advantage until they come into your office and you can prove it to them but you have to get them into your office.

Alexis: Right.

Dave: So now to answer your question the next thing I learned from Dan is the worst number in the world in any business is the number one. The number one, counting on one client, counting one source of ways to bring in leads and clients, anything of that nature where you're counting on one thing to drive your business is a disaster because if that one thing goes away well...

Alexis: Yeah and that's exactly right and that is what today's call is about. By the end of today's call everyone listening in will leave the call with 3 to 5 strategies that they can implement in 2009 in their own businesses to make 2009 their best year yet despite the economy. So again make sure you have your paper and pen and are taking notes.

Now there is no doubt Dave that our global economy has taken a turn for the worst. But that doesn't mean your personal economy has to do the same. I really want you to get this into your mind that you can separate your personal economy from the global economy. It's the actions you take in the next 6 months that are going to determine the state of your own personal economy and the fact that this is a time of huge opportunity.

Great fortunes were made during the Depression; great fortunes were made in the early 1970's. In fact, I'm reading Warren Buffet's book *Snowball* right now and he's talking about how literally everything he's talking about the early 1970's time period mirrors so uncannily what is happening right now. The same feeling

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and emotion was happening back then and you look at people now who built their fortunes during that time and you can do the same thing.

Here is the key though; you have to work harder and smarter. You cannot continue to do the same old thing you've been doing because if you were barely getting by with what you were doing before in our old huge economy where it was easy to succeed, if you were barely getting by then you're going to go out of business now. Now if you were doing okay in that economy when things were great or doing so-so you may find that you're barely getting by. But if you make some changes right now you will come out ahead in a huge way. And it takes faith to do this; it takes a lot of faith.

It takes faith in yourself and it takes faith in something bigger than yourself. If you don't have that faith what will happen is you will worry yourself and your business to death and I've been there and it is not fun at all.

Dave: It's not pretty at all.

Alexis: So you have to have that faith in yourself, you have to have that faith in something bigger than yourself and know that the actions you take now will pay off 10 fold, 100 fold down the road. But if you sit there paralyzed by fear what is going to happen is exactly what you fear most.

Dave: Absolutely. You're so right on the money there Alexis. Alexis what can the lawyers on the call do in 2009 to ensure they get a steady flow of new business coming through their doors? That is what they all want.

Alexis: I'm going to give you some big picture concepts and then after the big picture concepts, after we're all on the same page about what your macro plan needs to look like I'm going to give you some super focused ideas that you can begin to implement and in fact have some other lawyers I've been working with over the past year tell you about what they've done. Then I'm going to tell you how you can apply that in your own business right away.

So the biggest thing on the macro level is for you to get your marketing in 2009 to be focused, consistent and diversified. I want you to write those words down right now – focused, consistent and diversified. I'm going to break down each of those concepts for you so that you know exactly what that means and how you can do that in your business. You might say of course I want it to be focused and

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consistent and diversified but if you don't really know how to do that or what that means they're just words.

Dave: Exactly and that's the macro view of it and you're going to break it down. So let's start talking about focused first. What exactly do you mean by that?

Alexis: This is one of the most important concepts that most people, not just lawyers, but most people struggle within their own businesses and that is that you have got to be willing to market to only your ideal client. So on that paper you have write now I want you to write down who your ideal client is, describe that person in as much detail as you can and just start writing whatever comes to mind about who your ideal client is.

While you're doing that I'm going to talk about something quickly that is really important. As you're listening to this call and as you're doing any sort of learning at all it is extremely important for you to watch out for the I already know that demon. There is a demon that will sneak into your head and will say things to you like I already know that, I already know my marketing needs to be focused or I already know it needs to be consistent. But it those 4 words, I already know that that will sabotage you more than anything else in your life, not just in the area business and marketing but in every area.

What that does is it immediately puts the shield and stops you from taking in the most you possibly can and stops you from growing and learning. So anytime you find yourself saying I already know that, use that as a trigger to stop and say okay maybe I do already know it but what else can I learn about it and what actions can I take from it?

Dave: Or equally as important you might know it and I'm for this, you may know it but are you implementing it?

Alexis: Are you doing it?

Dave: Are you doing it? So what I do is I already know that and then I look and hell I'm not doing it. Knowledge is power.

Alexis: Exactly that's right; the power is in the action. So hopefully right now you've taken action and you've written down who your ideal client is in as much detail as you can. Now if you wrote down something like this, my ideal client is between the ages of 35 and 70, loves their family, has money and wants to leave behind to

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their family. If you wrote down something like that, something as broad as that you need to put a big X over it and write failed.

Why do you need to do that? Because what I can tell you is that your marketing will not be effective if you try to reach such a huge group like that. If you're trying to reach someone between the ages of 35 and 70 and loves their family and has money and assets that they want to leave behind to their family, how much of the population is that? It would be huge, it's a huge group. You can't easily reach all those people. And so many of us are doing that. Our number one ideal client is anybody with a checkbook. NO!! FAI!!

Now if you said my ideal client is between the ages of 53 and 62, lives in the South Bay that's my community and has a 9 to 5 job working for one of the big companies in your community, for example, in my community it would be TRW, Mattel, Boeing or Northrop. In your community, you have these big industries. Who does your ideal client work for? Maybe they're getting ready for retirement; they have grown kids either in college or just getting out of college or getting ready for college. They're married and drives a 3 to 5 year old sedan and owns their own home and has a retirement account with more than \$250,000 in it, another great ideal client. I say you win. That is a winning ideal client.

Now you could also say my ideal client is a mom between the ages of 28 and 42. She has at least one kid at home under the age of 5; drives a Volvo station wagon, a small SUV or minivan. She spends quite a bit of time on the internet, she goes out with her friends at least once a month works in a professional service industry and is one half of two working parent household. That is another winner.

Now can you start to see these people in your mind, can you start to see what they look like, what they're worried about, what they're thinking about? You could even say your idea client is between the ages of 40 and 60, owns a small business with revenues between \$500,000 and \$2 million dollars per year. They have children still at home, drives a BMW or similar type car and has a spouse at home that either works part time, takes care of the kids full time or has a work at home business. Another win.

See what we're doing here is getting very focused on our ideal client. And the more focused that you get the easier it is to reach this person because you're able to get into their head, you're able to start to consider what they're really worried about, what is on their mind. How you can emotionally connect with them in such a way that they want to do business with you. You get them; you understand them

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and the more you know about your ideal client the more you can laser focus your message. What you say and your media, how you get that message into their hands.

Now focus can be very scary. I understand. When I began to really focus my marketing on reaching moms with kids at home that was what I did in my own law firm, I really focused it. I was scared because what I thought was I would be eliminating all of the other people I wanted to reach, the business owners, the old folks, the people with grown kids. I thought if I laser focused my marketing to just reach these moms with kids at home; I would be cutting off all these other people.

But here is the amazing thing, the more I laser focused my marketing the more I attracted more of every different kind of client. I can't explain why it works but it works for every single person I've ever talked to, coached or worked with who has been willing to laser focus their marketing efforts.

Dave: So focus is number one.

Alexis: Focus is number one and it's hard and I acknowledge it's scary. But what you need to remind yourself is that fear is coming from limitation thinking. Limitation thinking that is telling you that there is not enough of that one ideal client you're looking for and I'm here to tell you that not only is there enough, there is more than enough. And when you do focus, it will not only bring in more of that one ideal client but more of everyone else. It takes faith.

Dave: So let's talk about the second part of this which is consistency. What do you mean by consistency?

Alexis: Okay consistent means that every single month you're going to be taking a set of actions that are designed to generate new business for you. It doesn't mean that you do something one month and then nothing the next month and then 2 things the month after that and then nothing and then something.

That is how you get on the cash flow roller coaster. That is how I got on the cash flow roller coaster. What I would do is I would do this whole big marketing campaign and then get busy serving the clients that came from it and then I would look up and realize oh no I have nothing in the pipeline. It was just this constant up and down flow of cash coming through my business. And I couldn't run a business that way effectively. I had this constant knot in my stomach, fear

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wondering am I going to be able to make payroll. How am I going to spend money on marketing? I couldn't project anything out because I didn't know where the clients were coming from. For a long time I had a big ball of fear in my stomach and I think it's important for everybody to know that because I carried that around with me for a long time. And I know there are a lot of people who are listening who are also carrying that around with them. And you don't have to carry it around with you. you're making a choice to do that but you can stop making that choice now if you follow these things I'm telling you to do, which again may take faith because some of the are contrary to your natural inclinations.

Dave I remember when I had my first consulting day with you. I flew out to Atlanta and at this point I had paid you \$30,000, signed a contract to work with you and paid \$30,000 to work with you which was obviously extremely frightening for me to do.

Dave: Plus a percentage of my business.

Alexis: Plus a percentage of my business, not the law firm business because I wasn't allowed to share fees with you on that but a percentage of my coaching business. I get there to Atlanta and I'm all excited because you were going to give me these new great marketing ideas.

The first thing you asked me to share with you is what am I doing that is working? So I run down this list of all the marketing that I had done in 2004/2005 that worked. And there was a whole lot of stuff that worked. You looked at me and said great just keep doing that.

Dave: Right end of consultation thank you for the \$30,000.

Alexis: I was like what, what do you mean? I paid you all this money to give me some new stuff. You said no you don't need new stuff you need to do what has already been working for you consistently.

Now that was an expensive lesson but it was totally worth it because that year after working with you I got really consistent with my marketing and that was the year that I hit a million dollars of revenue. I got off the cash flow roller coaster and that ball of fear in my stomach started to melt away and it felt really good.

Dave: Absolutely and that was a huge turning point. Let me say this, sometimes I need to remind you of this and I need to remind myself. Just because you are bored with your marketing, I'm placing the same ad, doing the same seminar; it doesn't

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matter if you get bored with it. All that matters are the results. Are the results still coming in? It's new; it's fresh to your prospects.

Alexis: That is exactly right and it's so important that you mentioned that. We both still need reminding of that. That is the benefit by the way of having a coaching type situation where I still have coaches.

Dave: I do too.

Alexis: We need those reminders. We need people to be reminding us on a consistent basis for ourselves because otherwise we lapse back into our old patterns.

Dave: Okay so we have focus that is number one and you want to determine who your ideal client is and match your message and of course the media to that person. So the next thing you gave us was consistent. You need to do the same things over and over again that are working.

Now let's talk about the next part, diverse, what does that mean?

Alexis: So by diverse I mean exactly what we just talked about at the beginning which is you cannot rely on just one source of business for your clients. I see a lot of lawyers who get stuck in this one source rut. I get all my clients from referrals or I get all my clients from the yellow pages or seminars and that is all good and well. But eventually that source is going to go back, that source is going to dry up and then you're in trouble. That is just too risky for you to build your business on.

You cannot build your business on one source of new clients. So diverse means reaching your ideal client in a variety of ways each month.

Dave: Absolutely and Alexis you have a group of lawyers really literally throughout the country who you call personal family lawyers. And I know you interviewed some of them and we're going to hear from them about the great marketing strategies they've used in their practice and I think this is very important by the way because this all sounds good in theory but let's hear from, later we're going to hear from those who actually applied the theory and the results they got.

Alexis: Right.

Dave: But in terms of diverse, what are some of the host of strategies that you recommend that the lawyers on the call use each month?

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Alexis: Let me just recap before I got into the specific strategies. On your piece of paper in front of you, you should have written down focused, ideal client and maybe you should have even written out the beginnings of the descriptions of your ideal client. Not just everyone with a checkbook ideal client but the specific person you are focused on reaching. You should have some of that down on your piece of paper. That by the way develops over time. You're going to fill that out and you're going to get even more focused on that. Then you should have written down consistent. You're going to be doing a set of marketing activities each and every month without fail. And then diverse and we're going to talk about the diversified strategies that you can be using in your business right now.

So the first thing you need to be doing every month without fail consistently is sending out a monthly newsletter to your leads, clients and referral sources. This has to be every month without fail, not quarterly, not every 6 months but every single month. And ideally this newsletter is not going to be the kind of newsletter you get in the mail that you immediately throw away, that is a glossy boring dry newsletter. It is going to be a newsletter that has interesting information that people actually want to open up and read that almost looks slightly homemade. Not totally homemade because you still want to be professional but something that is personal where they feel that they're getting a piece of you, where it has a story from you in it.

This is critically important, critically important every month, your leads, your clients and your referral sources.

The second thing you're going to do is send out a weekly email to your leads, clients and referral sources. The same exact people who are getting this monthly newsletter. You're going to do this every week without fail. Now this can be a fancy one like I send out. I send out an HTML email newsletter and you can sign up for that at www.FamilyWealthMatters.com and up in the right hand corner...and by the way check back on that site in about 3 weeks because we're doing a whole overhaul and its going to look so good, I'm so excited.

Anyway for right now go there and sign up and you will get every Thursday unless we're running behind and then maybe on a Friday you're going to get my HTML fancy pretty ezine. Now that takes us some time to put together every week, but you don't even need to do that. You can start out with a text based version. And if you want to see what that might look like, sign up at

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DaveDee.com and you will get Dave's not weekly e-newsletter, you will get his daily e-newsletter.

Dave: Very entertaining.

Alexis: But it is not like any e-newsletter you've ever received and it's going to give you a taste of exactly how you should be writing your e-newsletters. You'll see there is a lot of personal stuff in each of our e-newsletters. Now what I hear all the time from people who are receiving Dave's and in fact he just got 3 emails yesterday from people saying how much they look forward to reading his email every day.

Dave: Including one of your lawyers.

Alexis: Including one of my lawyers that's right. Now here is what I want to say, I do not believe that you should be sending out a daily email. Dave would disagree but he's a marketer. I think that you should be sending it out once a week that is perfect.

Dave: I actually agree with you on that.

Alexis: Oh you do?

Dave: Yeah I do agree with you but the most important thing and we don't have enough time to go into a whole email course but the most important thing I want to emphasize is it has to be personal. It cannot be coming from Jones, Jones & Jones law firm.

Alexis: That's right and when I first started working with Dave that was one of the things he had me change right away because I showed him some of the emails I was sending out and I seemed to remember the first email I sent out was this hideously long email about interest rates or something. Oh my God it was so boring. And he said you have to stop, this is horrible.

So he taught me how to write my emails and we do a whole course on that but we don't have time to go into it. But just get our emails and you'll see what we're doing and you can start to model them. One of my lawyers who does an amazing job at this is Gerald Kane, his ezine; I just look forward to reading it to see what he's up to each week. And that's what you want people to do.

Now so that's number 2 and write that down be sending out a weekly email and it can be fancy like mine or it can be a simple text based like Dave's. The key is get it out.

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Now the other thing you need to do is you need to place an ad in 1 or more local publications every month that reaches your ideal client. Now see how important it is to know your ideal client because now you can find a publication that is targeted to reach your ideal client. And you need to change up that ad each and every month, maybe not if it's working keep running it and you're going to hear from one of my lawyers later on who continues to run the same ad and gets a few clients every month from the same ad.

But there are different kinds of ads you can run. You can run an ad that is designed to get a direct call to your office. And maybe you're in a State by the way where you can't do that and that's fine because then you can run an ad to offer a free book or an ad for an event you're doing, so that you're not advertising legal services if you're in one of these restricted States.

So you can change it up or even better take out more than one ad depending on what your budget is. But no matter what run an ad every single month in a publication that is designed, that is targeted to reaching your ideal client.

Now the next thing is you want to line up at least one speaking engagement every month to a group of your ideal clients. Again, here is why it's so important to know who your ideal client is. Now this doesn't need to be a speaking engagement that you are paying put on. In fact, it should be a speaking engagement that you're not paying to put on where you're invited in to speak to a group of your ideal clients who are already gathered for some other purpose.

So you don't have to create the group, you don't have to find the audience, they're already coming together and you're going to see them. So that is every single month you need to be doing that at least once.

Then every quarter, you need to host at least one of your own seminars where you do pay to rent space, you do pay to send out the mailer and maybe you can even get sponsors for that if you can find someone complimentary to sponsor your events and pay for that because they want to reach the audience that you're reaching as well. Again it's so important to know your ideal clients so you can find those people. But this is one you're going to set up; you're going to bring a group together to hear you speak specifically. This isn't a group that already is coming together for another purpose.

Then you're also going to host at least every quarter a workshop event. There is a difference between a seminar event and a workshop. A seminar event is just

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educational. They're going to hear you come and speak and they're not going to actually leave having done anything, having completed anything. They're going to leave with a great education and they're also probably going to leave with some goodies you give them to get them to take the next step.

In a workshop event though they're going to leave having actually done some part of your process. So that is a workshop event. Then you want to also every other month, at least every other month preferably more if you can, speak to one professional group.

What is a professional group that is best suited to refer business to you? In my business that is CPAs, divorce lawyers, real estate agents, mortgage brokers, insurance agents. So every other month I want to be speaking to one of these professional groups that can refer me business and I want to make sure I have a strategy so I can collect their information, add them onto my house list and now keep in touch with these people who heard me speak and stay at the top of their mind and that way they're going to be sending me business.

I made myself into the expert and now they're going to send their clients to me and you want to do that every other month.

Now if you do all those things you're going to have a lot of leads. Leads are people who have raised their hands and said yes I'm interested in what you do. I may not be ready for what you do but I'm interested in what you do and I would like to hear from you again. Now you have a house list and you'll hear me refer to this a lot of times as your house list.

This house list is the most important part of your business, the most valuable part of your business. And what you want to do with your house list is send them out a monthly offer via direct mail to the warm leads who have raised their hand and said yes I'm interested, I want to know more about what you have to offer. Now you're going to send them out every single month an offer, not your monthly newsletter this is aside from your monthly newsletter. Your monthly newsletter might have an offer in it, it might repeat the offer you're going to send out but this is going to be a solo mailing in a postcard or letter that is designed just to get them into your office, to get them to take action. Some of them will and some won't but eventually when they need you they will and you need to keep offering every single month.

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So our warm leads are actually getting touched at least 2 times a month by mail in this direct offer and in the newsletter, 4 times a month by email, plus they're probably seeing us in a magazine they read and they may be seeing us at an event. Now that is diversified. And one of those times they're going to think boy I see that name around town a lot that must be the person to go to.

Routinely people came into my office and sat down with me and I would ask how did you end up coming to see me? They would say I saw you here and here and it just seemed like the universe was sending me a message that I needed to come and see you. It wasn't the universe, it was me, I was sending them that message. But it's the synchronicity that starts them to think they need to come in. then they said I felt like I knew you, so when it was time to get our planning done I didn't think of calling anyone else. That is how it works.

Dave: Absolutely that was huge. You're giving out so much information so fast; seriously I want the folks on the call to know they will be able to download this call afterwards in case they want to listen to it again.

The other thing is I want to quickly point out that this is a system. It is a system meaning all the pieces matter. So you say well I'm getting most of my business through email, as an example, so I'm not going to do direct mail because it's too expensive. No, no, no what she just said is so right. You want to hit as many media as you possibly can and it works together into a system. And if you work the system you're going to literally have really more leads then you can handle quite frankly.

Alexis: That's right and here is the other key to this and it is to automate these things. If you are a solo attorney doing all this by yourself you're not going to be able to do all of it, you can't. So you need to get some help and that doesn't mean you have to have an office full of employees. I can't imagine much that is less fun than that. But you do need to have a team supporting you. You need to have help and it can be completely virtual.

We run the Family Wealth Planning Institute which is a million dollar business on its way to being a multi-million dollar business completely virtually. You can do the same thing. There is a lot of virtual help out there these days and a lot of really great people coming onto the market with everything that is happening in the economy. So tap into that and you don't have to do all this yourself.

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Then, of course, there are so many web based systems now for automating all this. Obviously we can't go into all of these today but it is not as hard as you think. Here is the awesome part about it, you invest a little time in the start up, you invest a little money in the startup but then once its set up its going, it's consistent. These things cost money but they all pay for themselves. That is the most important thing as a business owner is to really look at is what is the return on investment?

And if you are doing all these things, you're getting a huge return on your investment because you're going to have that steady cash flow.

Dave: Exactly and now we mentioned earlier that you talked to some of your lawyers who are actually implementing this stuff and the result they got because I think it's very important to the folks here that this really works. What do you have for us?

Alexis: I promised you I was going to have 3 lawyers share their best marketing strategies that they used in 2008. But there were so many great stories coming in that I couldn't take less than 5. So you're actually going to hear from 5 and getting 5 strategies that you can implement in 2009. Now I already gave you more than 5 strategies you can implement in 2009 but let's hear what they had to say.

The first lawyer is David (last name) and earlier yesterday I asked David what his number one client attraction strategy was in 2008 and this is what he had to say:

David: The one thing that we've been doing that has worked really, really well for us is we have been putting on Kid's Protection Planning seminars. It is something I learned as part of joining the personal family lawyer program. We've been putting on these seminars for preschools and daycares and in addition to that we have a standing workshop we do on the 3rd Sunday of every month at a local Gymboree.

These are seminars; we always did seminars before but not in such a focused and structured way. As a result of what we've been doing in 2008 and we haven't really gotten it going up to its full potential yet but as part of my year end review I say we have at least 9 new clients from these seminars that generated about \$37,000 in additional revenue we didn't have before. We have potentially about 6 or 7 more prospects from those seminars who I know are going to be making appointments with our office.

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Alexis: Wow! Now you might be saying oh wow \$37,000 that's no big deal. Until you understand this, David just started this in October. He only did presentations in October and November for the 1st time, the 2 months that were the worst months in our economic history in 30 years if not since the Depression. And this marketing cost David nothing at all to get in place. His wife set up all the presentations, they were marketed for him by the preschools and daycares and all he had to do was pay to print up some flyers for the schools and show up and speak.

Now the best part about this is it's just one of the forces of his business. He has clients coming in from several forces including his monthly newsletter and his ezine. His marketing is focused and consistent and diverse, the perfect combination.

Now David recently told me that since he started his newsletter and ezine combo he's been bringing in clients that he has had in his database for as long as 3 years. These are people who just weren't ready to come in and see him when he first came across them and now they are.

Now our next lawyer is personal family lawyer Gerald Kane. Gerald has been in business for over 15 years and over the past year he has not only raised his fees but he's been engaging more clients than ever. I asked Gerald about his number one marketing strategy in 2008 and this is what he had to say.

Gerald: I don't think it's any one particular strategy, I think it's a combination of strategies working together. In particular, having as many seminars, at least 2 to 3 a month, the KPP seminar or the other one which is really allowing us to get in front of as many people as possible and build up our house list and in turn we communicate with them weekly through our weekly ezine and promote to them at least on a monthly basis through postcards and things like that, which in turn is bringing in a lot more business.

Alexis: That's great and it's really doing everything together. Are you, you mentioned if you can speak 2 or 3 times a month. Are you paying to set up those seminars 2 or 3 times a month or are those a combination of things where you are buying a mailing list and mailing out mailers and doing other speaking where you're not having to pay?

Gerald: Yeah the cost of those seminars, most locations allow us to come in with no cost. Then we're promoting to our house list and through various other internet

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resources to try to get as many people as possible to come to this without any great out of pocket costs.

Alexis: Gerald is another great example of focus, consistent and diversified marketing. He's consistently getting out there and speaking. And through his speaking he's building up what you'll hear me talk about a lot your house list. Your house list is the life blood of your business. Now if you're anything like me back when I first started out, you do not have a database in place to adequately collect information from the people who are your most likely clients and a way to continue to follow up with those folks each and every month.

I literally want to cry when I think about the number of people I spoke to and who expressed interest in meeting with me some day just not that day. The number of people who called my office asking questions about our services, the number of people who were referred to me and I didn't have a way to make sure I held onto their information and consistently made them aware of what I had to offer in a focused manner.

It wasn't until I started working with Dave and he started teaching me some of this that I realized how much money I had let go down the drain because I didn't have a way to collect, store and follow up with these people on a consistent basis. That is what Gerald has in place now that has made a huge difference in his business in 2008. So you need to make the growth and cultivation of your house list a priority for 2009. Write that down to make the growth and cultivation of your house list a priority for 2009. Go back like David did and collect all those people he talked to over the past several years, all those people you've come across and make sure that you get all their names and put them into a database so you can communicate with them on a regular basis.

I remember when I first learned about this and I went to Susan, my client services director, and I said to her okay Susan where are all those purple worksheets that we've collected over the past couple of years? She said I threw them away and I wanted to cry. She had called them and if they didn't want to make an appointment right then she threw them away. Yes it's painful.

So if the same thing has happened to you, you can't wallow in that misery and you have to move on from here with what you know and that is never throw away the name, address, email address of anybody who has raised their hand and said they do want to meet with you or get your newsletter or they do want to get the book or whatever. You need to keep that and follow up with them. Once you have

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your house list in place it's really important for you to communicate with them regularly with timely information they can use and build a relationship.

That is one of the things that Gerald has been awesome with is building a relationship. He's had a lot of personal things happen in his life this year and through his ezines he has shared that with his house list and they responded.

Now another lawyer who has learned the benefit of this is Robert Galliano. He discovered the importance of this in 2008 and this is what he had to say when I asked him for one of his best marketing strategies in 2008. Well actually before I tell you what he had to say, first he ran through about 4 of them and said okay which of these should I use? I did make him pick just one that he thought would help you the most and here is what he had to say.

Robert: I think the one thing would be something they should be focusing on which is current economic events like you do. You provide us with that information and you're on the cutting edge of any problem that exists. Then we're able to focus our attention on the current situation of our clients and they respond. I think that is something they can do because that for me, 4 people have called in on just the loan modification. I have had calls on the FDIC letter that you prepared.

Our practice never really paid attention in creating letters that would communicate with our clients and help them to solve problems they were experiencing due to current events. For example, the economic down turn on the real estate has caused loans to be upside down. And for our office to have been able to obtain, I would call them strategic letters and letters that explain what we can do to help them and forming strategic alliances so that we can provide a service to our client base has been an enormous positive response and service from us to the clients and the clients are calling in asking questions, sending in faxes, emails, trying to get more information. And it has been from our perspective a great show of being on top of the situation and being able to help the clients.

So I think that anybody who is listening to the call should pay attention to what the economic situation is or what the current events are and how your clients are being affected. Then formulate letters that can help them solve those problems and take a positive approach, talk to your client base, send them out letters.

Alexis: Yes, yes, yes this is so important. When I hear Robert talk it almost brings tears to my eyes because he has made such a huge transformation in 2008. He is one of

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the most unassuming lawyers that you've ever met and you might be able to hear that in his voice. But he actually won our implementation award for 2008 because he put so much in place and just so dramatically changed his business.

You heard him mention the loan modification letters and the FDIC letters he sent out. We prepared some letters that our lawyers were able to send out to their clients really addressing the current issues like he's talking about. And I think the loan modification one he just sent out on Friday and he had already received 4 calls on it and this is where we gave our lawyers a resource for helping their clients to be able to modify their loans because a lot of people are facing that right now.

Robert has been in practice for over 25 years and he was stuck in a rut and he got out of that rut this year. He said they had never communicated with their clients before and today he's created a continuing relationship with his existing clients by sending out the letters he described, he's launched his membership program. So he has continuing revenue coming in from his client base. He's been doing all sorts of seminars and events, generating tons of referrals from a unique strategy that he actually created.

He raised his fees from an average of \$700 to over \$4,000 this year. He has an engagement rate of nearly 100% using the strategies that he learned with the Client Engagement System and the marketing he told you about here is really just one of the strategies that he put in place that he's learned from me and Dave. It was hard for him to pick one but he did really want to pick one that you could implement right away and you can by being positive and proactive and reaching out to your clients with timely information that makes a difference in their lives like he has.

Now on the opposite end of the spectrum is Nicole Newman. She has not been in practice for 15 to 25 years like Robert and Gerald. In fact, Nicole just launched her own law firm in 2008. Now as you know that is a huge step and she's jumped in with both feet and she was an estate planning lawyer before that, so she wasn't brand new as you're going to hear from someone else who was brand new in a minute. But here is what Nicole had to say when I asked her to share one of her favorite marketing strategies for 2008.

Nicole: I would say the most effective one so far has been taking out a full page ad in a local parenting magazine using the Barber family ad, like the story. People who do not understand and trust estate planning, they do understand what happened in

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that article they do not want to have happen to their children. I think another effective strategy with that article is putting on the bottom the ability for the person to go on and order the Mom's Freedom Guide.

So it has allowed the people who are not ready to call an attorney go on and order the guide and then we've captured their information and then we're able to follow up with them and between the Barber family ad and the Mom's Freedom Guide, the ad alone has generated very consistent clients every month.

Alexis: Now what you didn't hear Nicole say is and I asked her this afterwards is if she was afraid to take out that full page ad? That is a big commitment, she signed a contract to advertise every month and I always recommend that you put that ad as close to the front or even on the back of the magazine and that's not inexpensive. She said she was afraid but she was able to push through that fear because she knew if she followed a system that it would work.

She's, the advertising she's using has a few components that are important for you to understand. Here is what they are, before I tell you what they are know this, because of these components she's generating a few clients every month with this ad. And the best part is she doesn't have to do anything at all to do that. She doesn't have to speak, she doesn't have to line anything up, she just has to place the ad and that's it and she has to spend the money, which was scary for her but every single month it is far more than paid for itself.

Now here is what this ad has, the ad she is running has that most other lawyer ads don't. The first thing is it has emotional copy. Emotional copy means it is written to create an emotion in the reader and that is critically important because if you don't create emotion in your reader they are not going to take action. So it has to have emotional copy.

Number 2 it has to have a strong call to action. Now her ad actually has two calls to action. One is a call to action to call her office directly and the second one is a call to action to request a lead generation piece and in her case it's the Mom's Freedom Guide. For those who are not ready to take the big step of calling a law office but they want more information and it's important for you to understand how, what a big step it is for people to actually pick up the phone and call your office and come in is a huge step.

So if you give them a smaller step they can take to get information from you, to get on your house list and then you follow up with them that is key. And for some

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of you, you cannot advertise legal services in your State but you can advertise for a free book or free guide and that is the key and that's what she's doing with that Mom's Freedom Guide.

Now the other thing Nicole is doing well which she didn't talk about here is her website. You can check out her website at www.NewmanLG.com. Nicole just recently began a local Google Ad Words campaign and she's already seeing results from it thanks to her effective website. Now most websites are not effective, so I don't want to see you go out and okay I'm going to do Google Ad Words. Because if your website is not effective then you're wasting your money.

But what you'll see on Nicole's is that hers is information based. It offers lots of opportunities for people to request free goodies from her like the books, the guide and she is collecting their contact information and able to follow up with them month in and month out consistently by mail or if they're signing up for her ezine weekly. That is the key, so don't go out and spend a lot of money on Google Ad Words before you have a website that is ready to capture information.

Now last but not least I spoke with Victor Medina. He is the most unique of all the lawyers because he is a brand new estate planning lawyer. I mentioned that Nicole launched her firm in 2008 but she worked for someone else in the field of estate planning for several years. Victor in contrast has never done any estate planning before in his life before 2008.

Now he's not only been investing his time in learning estate planning but he jumped right in on the marketing and didn't wait. Let's hear what Victor had to say on what worked for him in fact just last week.

Victor: One of the things I did and this actually came directly from the PFL program was reaching out to moms groups and talking to them about advanced planning issues. This is an incredible untapped area because if you think about it the moms are staying home as a decision, so the welfare of the children is of paramount importance and they're usually not given access to attorneys who know about advanced planning and things they can do to further protect their kids.

Alexis: So Victor you did a recent presentation for a group in your community and tell me a little bit about the results from that presentation?

Victor: What was supposed to be a 20 minute talk turned into 40 minutes because they were eager to hear everything I was saying. There were 8 moms that showed up

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and 6 of them indicated they wanted planning sessions and we were actually able to book 3 of those 6 so far and have them come in and get some initial assessment on what it is they're plan has or doesn't have.

The head of the group had promised to promote a KPP seminar that I was hosting later in January for the rest of the group that couldn't make it. So she was going to promote it to the other members that missed the opportunity.

Alexis: That's great and from the 3 that you scheduled already what do you anticipate in terms of revenue from engaging them?

Victor: My fee right now for planning that would be related to what they have is about \$4,000 and I've been lucky enough to enjoy about a 90% rate on signing them up after an initial meeting. So apply those numbers together and you figure I'm looking at anywhere between \$10,000 and \$11,000 in revenue just from talking on a Saturday.

Alexis: It is so great to hear that because Victor was practicing almost exclusively representing schools up until a few months ago. Even in this economy he has over \$10,000 in revenue expected from 1 Saturday 45 minute presentation, which by the way the presentation was supposed to be 20 minutes but they liked it so much they wanted him to be there longer.

And the presentation cost him nothing at all to get in place, nothing. And that is just the beginning because only half the people who requested appointments have been booked so far. He's very likely to generate ultimately \$20,000 of immediate revenue from that one event. So that is nothing to sneeze at that's for sure.

So let's put all this together for you. Your market has to be focused, consistent, and diverse. I'm sure you've got that written down. And if you identify your ideal client and then you consistently reach them with the right message, tapping into what they will emotionally respond to through the right media...and when I say media I mean magazines, internet, the place you reach them. And then you follow up with them each and every month consistently after they're brought into your sphere of influence by cultivating that house list.

Your 2009 will rock no matter what is happening in the global economy. Your personal economy will be through the roof.

Now I promised you I wouldn't be selling anything on this call and that it would be 100% content and I have to say that it was. If you want to get more great

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content just like this I want you to put down on your calendar January 6th at 12 p.m. Pacific time and 3:00 p.m. Eastern time, just put that on your calendar now and then watch your mailbox, your Twitter account, your Face Book page wherever it is you see me and I promise to get you information well in advance of the call as to what we're doing on January 6th.

But do block that time now because what I'm going to do during that call and it's also going to be free by the way, is I'm going to teach you how to do the lucrative legal planning for parents that many of the lawyers on today's call referred to. Its super easy once you know how to do it and you can begin doing that in 2009.

As I said it's a free call on January 6th at 12 Pacific so mark that on your calendar. Then also mark on your calendar January 15th. We'll be having our personal family lawyer discovery call where you'll learn how you can become a personal family lawyer, you can be one of the only 15 lawyers that we will be accepting as personal family lawyers in January of 2009 and get your business going gangbusters right from the beginning of the year with my personal hand holding guidance and with me doing a bunch for you by the way. So that is on January 15th at 12:00 Pacific and 3:00 Eastern, mark that down as well. And we'll get you registration information for that one after the 1st of the year.

Now if you want to be sure to get a recording of this call, which you should because I gave out so much great information you're going to want to listen to this again and again so you can be putting it in place for yourself. Make sure to go to www.LawBusinessSecrets.com/holiday if you have not already. Some of you did, are already registered for the call there. If you did you'll be getting the replay link of this call which you can download.

If you haven't gone there already, go to www.LawBusinessSecrets.com/holiday and leave your name and email address that way you'll be sure to get the download link to this call. The other thing you'll get when you do that is you will hear from me every Thursday with my e-newsletter for Law Business Secrets. You'll see that that's very different then the Family Wealth Secrets ezine which we sent out which as I talked about is the pretty HTML version. You'll be getting a very simple text based e-newsletter with a weekly tip in it that you can implement in your business right away to bring in more profits, more clients, more business and enjoy your life and business a whole lot more.

That's it and I want you to have a fantastic holiday, a very Happy New Year and here is what I would also love for you to do for me as your gift to me. I would

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love you to email me and let me know what you thought about this call. And most importantly I would love to hear the one strategy that you learned during this call that you are going to implement in your business in 2009. If you can email that to alexis@familywealthmatters.com it would make my holiday season really great because when I hear from you about what you're doing and how you're taking what I teach you and implementing it, it makes me want to create more and give more.

So I can't wait to hear from you at alexis@familywealthmatters.com. So I can continue to provide you with content that you're going to take and implement.

Dave thank you so much for being here on the call with me today. I really appreciate it.

Dave: It was great. I wanted to take notes. Seriously it was awesome.

Alexis: I'll get you the recording to so that you can do that. Everybody else thank you for being here, I will see you in 2009. I know you are going to make 2009 the very, very best year ever no matter what. Your personal economy is going to take off. Thank you and I'll see you then, bye.

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Marketing to Your Clients

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MARKETING TO YOUR CLIENTS

Let me begin by saying this is not an academic paper, rather, it is a stream of consciousness regarding marketing, and specifically, marketing to our clients.

Most professionals, including accountants and lawyers, receive a disproportionately high percentage of their business from existing clients. I don't know what the actual percentage is, but I'm sure you will agree that this is the case.

Warren J. Wittreich wrote an article in the *Harvard Business Review*¹ "We sell services" and there are several differences between buying and selling goods and services:

- goods are tangible – services are not;
- goods are finite;
- services are often not well defined
- need to consider the difference between selling a photocopier to a customer and determining what type of legal services a client will need to deal with a clients problem

When we sell services, we need to consider 3 main concepts²:

1. minimize uncertainty so that client has piece of mind and confidence in you;

¹ Warren J. Wittreich, "How to Buy/Sell Professional Services", *Harvard Business Review* (March 1966).

² *Ibid.* at pg. 128.

2. understand the problem; and
3. understand that we are professionals who sell ourselves.

Understanding the difference between selling goods and services is an important step to learning how to market yourself and the services that you provide. This brings me to marketing to existing clients. David H. Maister wrote a book in 1993 called “Managing the Professional Services Firm”³ which I recommend you all read.

Chapter 9 of the Maister’s book deals with marketing to existing clients and the following list comes from that material.

The question is: Why should we devote time to marketing to our own clients?

1. Existing client represents a higher probability prospect because:

- In order to get business from a new client, need to develop trust and confidence which can take substantial time and effort; with an existing client, presumably you’ve already done that.
- You are likely to be in non-competition environment and uncovering some new need for a particular client in the course of doing existing work for them will usually result in your getting that new work.

³ David H. Maister, *Managing the Professional Service Firm* (New York: Simon & Schuster, 1993).

- May require cross marketing within your firm as other disciplines may be necessary to assist client with the new problem.

2. Marketing costs will be much lower because:

- there is probably less wining/dining and schmoozing necessary.

3. Follow on services for existing clients is often more profitable because:

- You will be in a non-competitive environment, and therefore likely to be less pressure on fees and greater ability to charge full rates.
- Usually there is no learning curve as client is familiar with you and your firm and its ability to provide value.
- You will have the ability to use and integrate lower cost juniors to some of the work so you can speed up delivery and reduce cost to client.

4. Ability to develop new type of work for existing client because:

- Client already has confidence in you so it is likely that they will look to you to provide different type of service.
- It will allow you and your firm to develop different types of work.

So if all of this is true, why go offer a market to new clients:

- need to reseed the pool
- getting new clients gives you a great feeling of “I did it”, “I brought in new business”.

How do you go about making the client want to use your firm again?

1. go the extra mile;
2. increase client contact;
3. build business relationships;
4. build the personal relationship.⁴

Once we get the client in the door, retention is extremely, as competition is fierce and others are going to try to get that client to come to them and leave you. So what can we do to retrain clients?

Mr. Milton W. Zwicker, a lawyer from Ontario, wrote an article called “What clients really want from their lawyer”⁵ and in it he identifies 10 things that our clients want from us:

1. “Listen to me please”. Lawyers are not always good listeners.

⁴ *Ibid* at pg. 106.

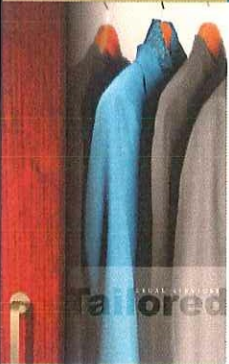
⁵ Milton Zwicker, “What Clients Really Want From Their Lawyers”, *Law Practice Management*, Vol. 4 (January 1995) 24.

2. “Don’t forget to ask what I think”. Our clients have been living with the issue for some time and they usually have a good idea of how the solution can be achieved, if only we ask.
3. “Don’t belittle or reject my concerns”. Client needs to know that you understand their concerns and that you actively deal with them.
4. “Don’t treat me like a file, treat me like a person”. Learning about the client’s issue or problem is not the same as learning about the client and learning about the client will help you foster a better understanding of the issue and how it affects the client.
5. “Speak to me, not at me”. When our clients are present, speak to them and not abstractly about the problem or issue.
6. “Tell me how much you will charge for your services”. One of the biggest sources of client dissatisfaction is not understanding how much or how they will be charged and more open communication with the client will certainly minimize this cause of concern to the client.
7. “Be available when I need you”. Clients understand that they are not your only client, but they expect your full attention when speaking and dealing with you.
8. “Don’t tell me how smart you are, show me”. Clients want us to speak to them in language they understand and not to get defensive if they ask questions.
9. “Keep me informed”. Again, communication is key here as well as coordination of who will be speaking to the client.

10. “Let me know how much you care”. Don’t let your client become spectators in the process.

Nothing that I have said here is new to you, but I think that we need a reminder every so often that in our business, we sell ourselves and with technology, it is becoming more competitive and at the same time, easier and more difficult to do.

Marketing, like anything else, takes time to learn and practice to perfect. After 20 plus years of practice and a lot of schmoozing, I recently attended a one day course on networking. I didn’t learn much that was new to me, but hearing from a professional and participating in the program energized me to get busy and I recommend you do the same.

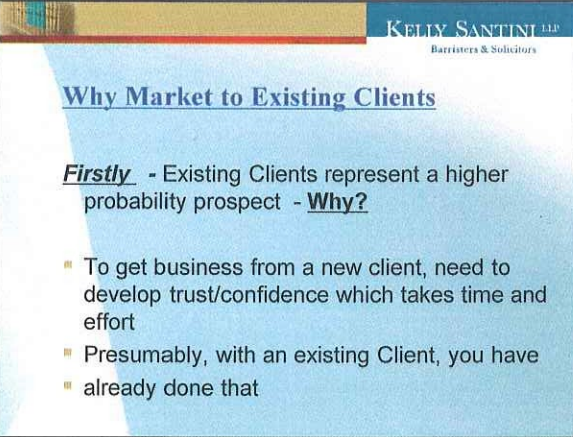


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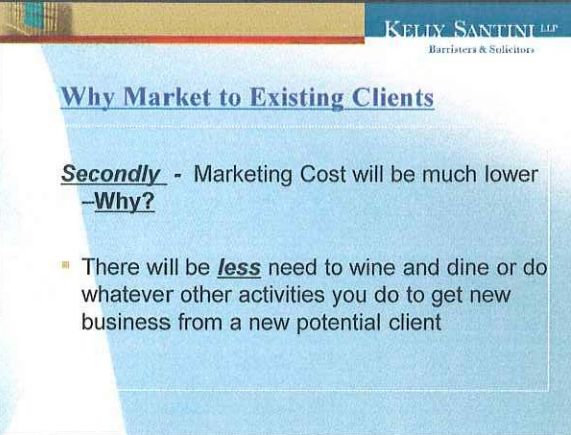


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Why Market to Existing Clients

Firstly - Existing Clients represent a higher probability prospect - **Why?**

- To get business from a new client, need to develop trust/confidence which takes time and effort
- Presumably, with an existing Client, you have
- already done that



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Why Market to Existing Clients

Secondly - Marketing Cost will be much lower - **Why?**

- There will be **less** need to wine and dine or do whatever other activities you do to get new business from a new potential client

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Why Market to Existing Clients

Thirdly – Follow-On Services for existing Clients is often more profitable – **Why?**

- Usually no Learning Curve
- Fewer Write-offs

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Why Market to Existing Clients

Fourthly – Development of New Type of work for Existing Clients - **Why?**

- The existing client is likely to give you a chance on a different type of matter because of the trust and confidence that they have in you

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Market to Existing Clients Exclusively?

If all of the above is true, then why go after "new" business?

- Need to "reseed" the pool
- New clients provide a freshness or a reinvigoration
- Reach a saturation point
- Therefore we need ***BALANCE***

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How to Market to Existing Clients

1. Go that extra Mile
2. Increase Client Contact
3. Build the Business Relationship
4. Build the Personal Relationship

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What do our Client's want from us?

1. Listen to me, PLEASE!
2. Don't forget to ask me what I think
3. Don't belittle or reject my concerns
4. Don't treat me like a file – treat me like a person
5. Speak to me, not at me

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What do our Client's want from us?

6. Tell me how much you will charge me
7. Be available when I need you
8. Don't tell me how smart you are, show me
9. Keep me informed
10. Let me know how much you care!

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Tailored

The advertisement features a photograph of a wooden wardrobe with several suits hanging on hangers. A large blue question mark is centered on a white background to the right of the wardrobe. The text 'KELLY SANTINI LLP' and 'Barristers & Solicitors' is at the top, and 'Tailored' is at the bottom left of the image area.
