Module 17
DEVELOPING A MARKETING STRATEGY

I. FOUR ELEMENTS OF EFFECTIVE MARKETING

A. Planning in Advance for Your Success

B. Building Strong Attorney-Client Relationships by Committing to Quality, Excellence and Service

C. Creating and Projecting a Winning Brand and Image

D. Implementing Relevant and Effective Marketing Strategies

II. PLAN IN ADVANCE FOR YOUR SUCCESS

A. Create a Vision Statement, Mission Statement and Core Values


     a. This is your core business purpose.
        (1) The destination you see for yourself.

     b. Example: Vickie Milazzo Institute’s vision is revolutionizing nursing careers one RN at a time.


     a. This is why you exist, what you intend to accomplish.
        (1) It’s what you do to achieve your vision.
b. Example of one component of the Institute’s mission:
   (1) We will master our destiny and inspire nurses to master theirs with passion, purpose and power. We are committed with enthusiasm to the belief that anything is possible.

3. Core values.
   a. These are your basic business beliefs.
   
   b. Example: The Institute exists because of Certified Legal Nurse Consultants\textsuperscript{CM}. We treat all Institute students and CLNC\textsuperscript{®} consultants professionally, respectfully and with integrity. We build superlative and life-long relationships with CLNC\textsuperscript{®} consultants.

B. Research Your Market

1. 13 effective ways to locate attorney-prospects:
   a. Networking.
   
   b. Legal organizations.
   
   c. The Internet.
   
   d. Social media.
   
   e. Legal directories.
   
   f. Legal publications.
   
   g. Media.
h. Public speaking and writing articles.

i. Advertising by attorneys.

j. Advertising by you.

k. Referrals.

l. Existing clients and former clients.

m. Opposing attorneys.

2. Describe your ideal attorney-prospect.
   a. Plaintiff, defense or both.
   
   b. Size of law firm.
   
   c. Specialty practice.

3. Determine where the attorney-prospect is located.
   a. Determine the geographic boundaries of your service area.

4. Assess the attorney-prospect’s needs.
   a. Assess whether you can provide CLNC® services that meet the attorney-prospect’s needs.
C. **Develop and Implement a Marketing Plan**

1. Develop the plan.
   a. Objectives.
   b. Strategies.
   c. Target dates.
   d. Budget.

2. Implement the plan.
   a. Do something.
   b. Market to qualified prospects.
   c. Make marketing an ongoing commitment.
   d. Practice first where it won’t count.
   e. Follow up on every lead timely.
   f. Do not give up or get discouraged.

D. **Evaluate the Effectiveness of the Marketing Plan**

1. Once in place, evaluate the plan for effectiveness.
   a. Be open to what’s not working.
2. Refine the plan based on evaluating the results.
   a. Change strategies as necessary.
   b. Try different approaches.

3. Reevaluate the plan regularly.

III. BUILD STRONG ATTORNEY-CLIENT RELATIONSHIPS BY COMMITTING TO QUALITY, EXCELLENCE AND SERVICE

A. Focus on the Attorney-Prospect and the Prospect’s Needs
   1. Learn as much as you can about the prospect.
      a. You can’t market something you don’t know to someone you know nothing about.
      b. Focus on the benefits your CLNC® services offer the attorney-prospect.

B. Position Your CLNC® Services in the Minds of Attorney-Prospects and Clients
   1. Positioning is what you accomplish inside the mind of the prospect.
      a. Positioning is not about the service or product.
   2. Positioning strategies.
      a. Get there first.
      b. Find a horse to ride.
c. Look for holes and fill them.

d. Know your USP.

e. Keep the message simple, subtle and consistent.

f. Once there, stay there.

g. Manipulate what is already in the mind. Retie the connection.

h. If you have a winning formula, stick with it.

i. If you’re successful, capitalize on that fact.

C. Pay Attention to Objections Attorney-Prospects Raise

D. Deliver Quality Service

IV. CREATE AND PROJECT A WINNING BRAND AND IMAGE

A. A Winning Brand and Image Come from Everything You Do

1. Company name.

2. Promotional materials.

3. Website and Internet presence.
4. Physical presentation.

5. Professional demeanor.

6. Communications, written and verbal.


8. Reliability, dependability and timeliness.

9. Quality of work product.

B. Act Professional and Credible

1. Project that you are the expert.

2. Set yourself apart. Communicate your USP.

3. Focus your communications.

4. Project that you are quality-oriented.

5. Be bold.
C. **Dress the Part of the Professional Consultant**

1. Simple.


4. Powerful.

5. Conservative.

D. **Develop a Winning Promotional Package**

1. Components of solid promotional package:
   a. Envelope and letterhead stationery.
   b. Business cards.
   c. Resume or CV.
   d. Letter of introduction. (**Sample A**)
   e. Brochure.
f. Sample work product.

g. Letters of recommendation.

h. Fee for service schedule – NO!


   a. Image is everything.

   b. Use professionals – spend the money to do it right.

   c. Qualify your attorney-prospects before sending them an expensive package.

   d. Customize the package to the prospect.

   e. Bring complete promotional packages to interviews.

   f. Bring extra promotional packages to interviews.

   g. Revise the promotional package regularly.
      (1) An obsolete package does not support a quality image.

   h. Create a website to validate your CLNC® business.
V. IMPLEMENT RELEVANT AND EFFECTIVE MARKETING STRATEGIES

A. Network with Anybody and Everybody

1. What networking can do for you:
   a. Enhances credibility.
   b. Creates visibility.
   c. Opens doors.
   d. Allows you to collect and exchange information.
   e. Opens communication.
   f. Provides mentoring and support.
   g. Provides brainstorming opportunities.
   h. Provides synergy.
   i. Educates you about current trends.
   j. Keeps you from having to reinvent the wheel.

2. Strategies for maximizing networking opportunities.
   a. Look at every event as a networking opportunity.
   b. Prior to the event.
      (1) Know who will be there.
      (2) Set objectives for yourself.
(3) Practice two conversation starters geared toward the event.
(4) Practice a self-introduction tailored for the specific event.
(5) Pack business cards.

c. At the event.
   (1) Mingle with as many people as possible.
   (2) Write a note on the back of each business card you receive to jog your memory about that person or their organization.

d. After the event.
   (1) Follow up on contacts immediately and set up appointments, if applicable.
   (2) Send thank-you notes.
   (3) Share your success.
   (4) Ask for what you need.
   (5) Evaluate the event and the networking group.

B. Deliver Quality Service to Win Quality Referrals

   1. The best marketing strategy is the work product itself.

   2. Referral is the easiest and most powerful marketing strategy.

   3. Clients will only refer you if they believe in you and your product and services.
      a. Provide cost-effective service.
      b. Act with integrity and meet or beat deadlines.
      c. Anticipate and actively respond to your attorney-client’s needs.
         (1) Deliver more that what’s expected.
         (2) Obtain feedback from your attorney-clients.
4. Request referrals.
   a. Systemize your referral strategy.
   b. Follow up on every lead.
      (1) Reference the referring attorney.

5. Acknowledge referrals.

C. Exhibit Effectively at Legal Conferences

1. Develop a professional display.

2. Develop a conversation starter to get people to talk to you.

3. Be enthusiastic.

4. Invite the prospect to come into your booth rather than stand outside.

5. Hand out promotional packages.

6. Stand up during exhibit times.

7. Have a reason to close the sale.

8. Offer a prize.
9. Deal proactively with problems.
   a. Discomfort – Keep water in the booth and take breaks if you have someone to replace you.
   b. Distracting noises from competing exhibitors – Ask them to turn the sound lower; report to the appropriate person if they don’t cooperate.
   c. Lingerers – Politely try to get people to move on.
   d. Running out of promotional packages – Take the prospect’s name and follow up with information.

10. Follow up on leads immediately.

D. Devote a Percentage of Your Budget to Advertising

1. Advertise in a focused publication that targets your market.

2. Advertise regularly to get your best result.

3. Keep your ad simple, brief and consistent.
   a. You want people to recognize you and to know that you know who you are.

4. Develop an ad that is believable.
E. **Implement the Mail/Call Strategy**

1. Telephone marketing.
   a. Write your introduction and script.
      (1) Write your responses to anticipated questions.
   b. Practice the script with someone.

2. Direct mail.
   a. Build a list.
   b. Test different promotional tools.
   c. Implement mail/call/mail/call/mail/call/mail.
   d. Effective direct mailings.
      (1) Use emotions: fear, money, time, etc.
      (2) Give the prospect an incentive to act *now*: free, guaranteed, save, new, discount, etc.
      (3) Customize your direct mailing efforts.
      (4) Let attorney-prospects know they can get everything they need from you so they do not have to shop elsewhere.
   e. Have a reason to communicate to existing clients.
      (1) Holidays.
      (2) Information newsletter.
      (3) New products and CLNC® services.
   f. Gain permission to sell.
F. Keep Your Name in Front of Attorney-Prospects and Clients
   1. Speak at legal conferences and present relevant topics to law firms.

   2. Write articles for legal publications.

   3. Send helpful information on a case.

   4. Send copies or your articles and accomplishments to prospects and clients.

G. Offer a Risk-Free Guarantee

H. Enhance Your Public Image and Overall Visibility with PR
   1. Send news releases to newspapers, magazines, radio, television, professional publications, appropriate websites and blogs and other media.

      a. Send the news release to the right person.

      b. Write the news release so that it looks like a news story, not an advertisement.
         (1) Emphasize the benefits of the story to the reader.

      c. Develop a newspaper-style headline for the news release.

      d. Keep it brief.

      e. Send along any helpful background information, photos, etc.
December 7, 0000

Haywood Jubuzoff, Esq.
CFI Care Insurance
1211 Lostitsome Place
Poughkeepsie, NY 10122

Dear Mr. Jubuzoff:

It was a pleasure to meet you at the Poughkeepsie Bar Association malpractice conference. I appreciate your interest in my legal nurse consulting services. [Or (name of referral) who suggested that you might be interested in my legal nurse consulting services.]

In medical malpractice [or whatever the attorney specializes in] cases, mastery of both the medical and nursing aspects is critical to achieving a successful outcome for your client. As a Certified Legal Nurse Consultant*CM*, I can put that kind of mastery to work for your legal practice. My professional services that will enable you to develop your cases quickly and cost-effectively include:

- Reviewing and screening cases to keep you from wasting time and resources on nonmeritorious cases;
- Reviewing and analyzing medical records for deviations from the medical and nursing standards of care that can affect the outcome of your case;
- Summarizing medical records and preparing brief opinion reports to bolster your position;
- Preparing in-depth medical and nursing literature searches that provide the theoretical foundation for your case development;
- Identifying additional documents vital to your case preparation; and
- Locating expert witnesses who can support your case with authoritative testimony.

My extensive nursing background includes 10 years in medical-surgical and obstetrics. My varied career has given me firsthand experience with many of the issues you face in your medical-related cases. In addition, I have access to a nationwide network of skilled healthcare professionals available as testifying experts.

The enclosed brochure [or flyer, resume, etc.] discusses my services and experience in more detail. I have also enclosed selected portions of a typical comprehensive report for your review. I’ll be contacting you within the next week to see if I may assist you in preparing your next medical-related case.

Very truly yours,

Annie Histameene, RN, CLNC

Enclosures: [List enclosures]