



actionstep

Law Firm Marketing Plan Template

Introduction

Every law firm needs to consider growth as part of its overarching strategy. However, in a crowded and competitive marketplace, it can be difficult to stand out and attract new business. This is where marketing becomes vital; it allows you to tell your firm's story, in exactly the way that you want, to right-fit prospective clients.

Marketing is constantly evolving according to technological advancements and overall cultural trends. With so many marketing tactics and tools available, it's important to home in on what will work best for your law firm's brand and budget. This marketing plan template will help you focus your message, narrow down your tactics, and establish concrete goals to grow.

You can use this tool for your firm as a whole or break it out for individual practices.

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1. Situational Analysis
2. SWOT (Strengths, Weaknesses, Opportunities, Threats)
3. Overall Practice Objectives
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5. Marketing Approach
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Want more information on the variety of marketing tools and tactics to choose from? Check out our [guide to Law Firm Marketing Strategies](#) here.

SITUATIONAL ANALYSIS

Use this section to define your law firm’s unique ideal target clients, unique value proposition, specific current challenges, and primary competitors.



Your Services

What do you offer? What is the “why” behind your services, specifically, beyond simply making a profit, what is the value and purposes of the services you provide to your clients?

Target Clients/Sectors

Who are your ideal clients/sectors? What do they worry about? What do they want? Where do they gather physically and virtually?

Unique Value Proposition

What is your law firm’s unique value proposition? What sets you apart from competitors in the eyes of your target clients?

Current Marketing Objectives and Performance

What are your law firm’s current marketing objectives, if any? Have you managed to achieve them?



These fields are editable! Just click on them to type & edit!

SITUATIONAL ANALYSIS

CONTINUED



Prior Successes

What prior marketing activities can you link to revenue? What did you invest in and what was the outcome? Why were these successful?

Challenges

What are the current challenges that your law firm/practice is facing?

Competitors

Who are your primary competitors? How are they currently performing? What marketing tactics are they currently using?

STRENGTHS

What makes your firm stand out from competitors? What are you known for? Why do clients turn to your firm over another firm?

WEAKNESSES

What are your potential limitations? I.e. Firm –specific factors, practice weaknesses compared to competitors.

OPPORTUNITIES

What future firm factors or market trends could help you improve market position and gain market share?

THREATS

What future trends or external factors may limit or reduce your competitive position? Example: Are you missing key partners in a specific practice that is needed?



OVERALL PRACTICE OBJECTIVES

Use this section to outline your firm’s objectives in terms of competitive positioning, client types and balance of work.



Revenue Targets

What is the overall practice revenue target for this year? List expected annual revenue from different sub-practices, current clients, targets, referrals.

Current Client Type, Industry, or Practice Targets

For each sub-practice: List goals for the types of clients and specific industries or practices where you see future growth and its projected impact on revenue. Which clients do you already have in this space? Can you leverage them as referenceable clients/case studies/referral sources? Which current clients can you cross-market to?

New Client Type, Industry, or Practice Targets

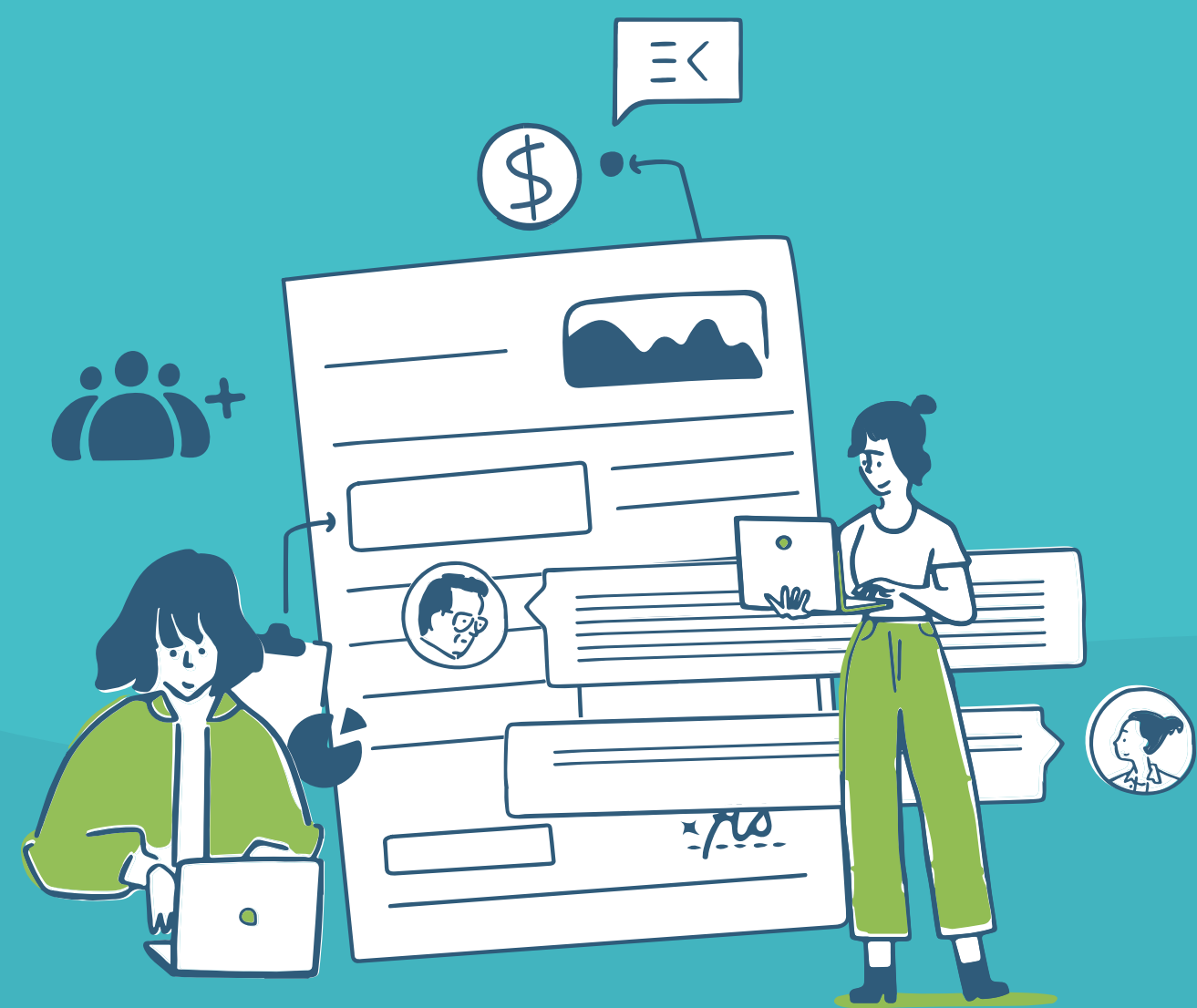
What industries or practices are you looking to move into? Do you have key clients that could be leveraged for cross-marketing to begin to develop these new practices? For example, can you get additional IP work from a current litigation client?

Type of Work

What is the ideal balance of work within the practice given the available resources and areas of expertise? What is the expected development of more lucrative areas of work? What impact will trends in the market have on practice growth? Do you need to invest in additional resources or attract new partners to maintain the right balance?

OVERALL PRACTICE OBJECTIVES

CONTINUED



Market Share and Position

Overall or by sub-practice: What portion or increase in market share do you realistically want to achieve? How would you like to be positioned against competitors?

Profile

Identify team members who need to have an increased profile in market (this may also tie into succession planning). What areas of expertise need a better profile? Who in market, as a comparison, has the desired profile?

New Accounts/Revenue

Identify the number of new accounts and value you plan to generate this year.

Current Account Growth/Revenue:

If applicable, identify the increase in matters you plan to generate from current clients and the business value associated with them.



CURRENT CLIENTS, TARGETS, AND REFERRAL SOURCES

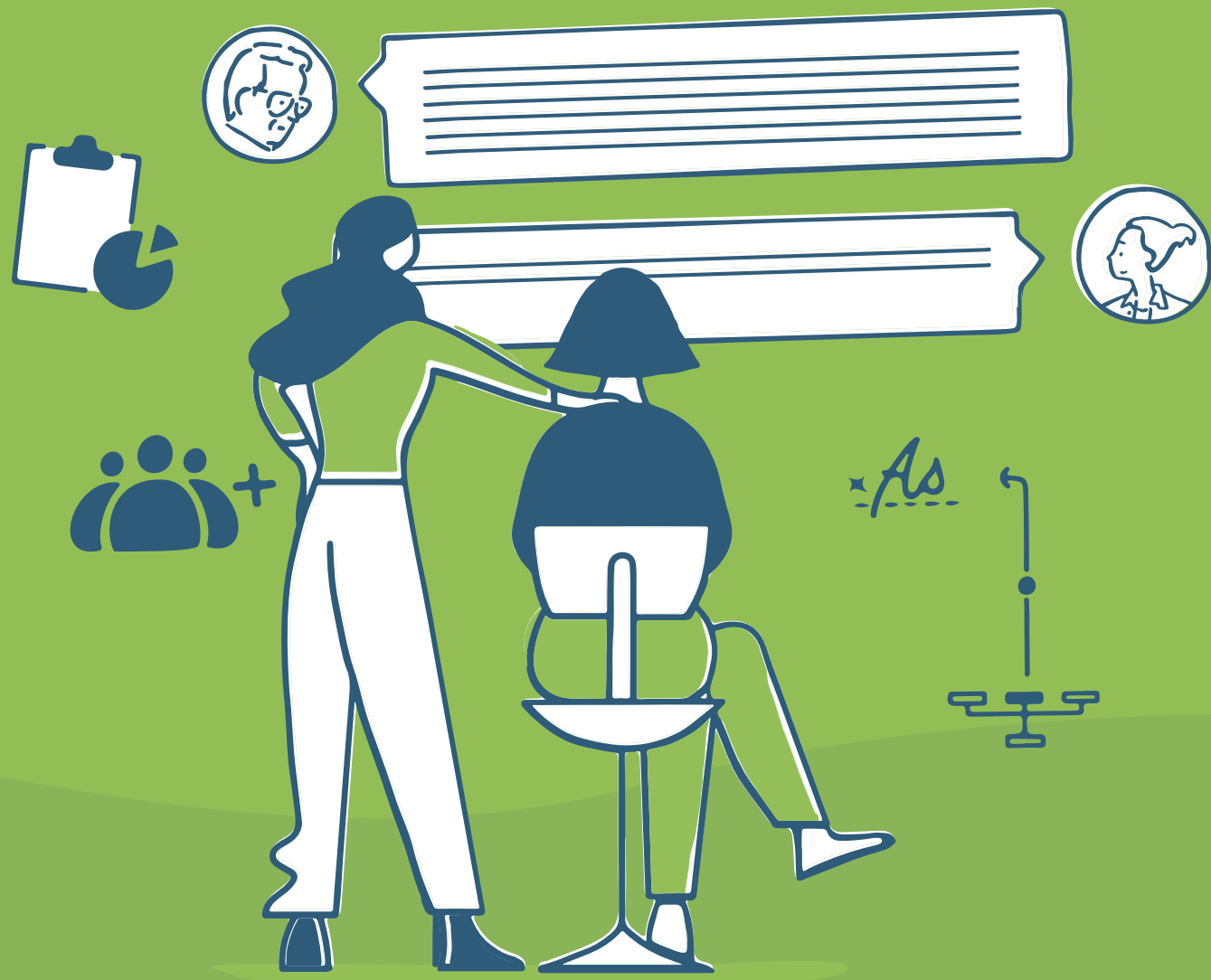
Use this section to outline your current practice work sources and determine where improvements can be made to increase success/margin and focus.

Where you have multiple sub-practices, identify clients, targets, and referrals for each sub-practice by repeating the tables.

As you fill out the “Action” section of the table, keep the acronym S.M.A.R.T in mind. Your actions should be Specific, Measurable, Achievable, Relevant, and Time-Bound.

5 KEY CLIENTS

Which clients are crucial to your practice or have the potential to grow into top positions?



Client	Key contacts	Opportunity	Goals	Lead partner	SMART Action
Client Name	Strongest relationships & decision makers	E.g. continue/build on prior work	Protect from other firms X in revenue Y transactions of Z type	To coordinate activity	Look at gaps in current relationships. Ongoing program of relationship building activity. E.g. workshops, presentations, updates, regular matter calls, introductions of use to them

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TWO CLIENTS TO DEVELOP AND BROADEN

These clients should be representatives of target sector/client type in your objectives. How can you increase the number of matters for current clients, either through cross-practice promotion or more matters in a particular practice?



5 KEY TARGETS

These should be representatives of the target sectors/client types you identified in your objectives.



Target	Key contacts	Opportunity	Goals	Lead partner	SMART Actions
Target Name	Who represent best routes of access	Why should we target them now? E.g. commercial activity, unhappiness with current firm, improvements to our own expertise	E.g. invited to tender/pitch, X new matters, increased engagement in our BD / marketing such as events, meetings	To coordinate activity	What will we do to get in front of them, help them see our value, ask for work? E.g. coffees with contacts, ask to pitch, proactive focus on their potential legal/ commercial issues.

Referring Org	Key contacts	Opportunity	Goals	To Coordinate Activity	SMART Actions
Referring Org Name	Who represent best routes of access	Experience on prior work, potential for future work	E.g. X new referrals	<div>This practice:</div> <div>Other practices:</div>	<div>How will we maintain relationship?</div> <div>How will we reward them for referrals?</div>

REFERRAL SOURCES

Who or what type of organization typically sends new clients your way and why? How can your firm deepen those relationships?





MARKETING APPROACH

Use this section to define your specific marketing goals, and then outline the channels, tactics, team members, and timing that aligns with each goal.

Remember, your marketing plan does not have to be formulaic or incorporate every single channel or tactic – no one size fits all. As long as the planned activity gives you access and visibility with your defined target segment and can be linked to new enquiries and revenue, do what comes naturally to you/your team and what you naturally enjoy. That could be anything from joining networking groups or associations to creating video content or investing in redesigning or enhancing your firm's website.

MARKETING APPROACH

We recommend you include between three to six activities only to ensure you can execute them effectively.

If you need a refresher on marketing channels and tactics, check out this guide to Law Firm Marketing Strategies [here](#).

Goal (Why)	Channels (What)	Tactic (How)	Owner (Who)	Timing (Frequency Or Deadline)	KPIs (Key Performance Indicators)
Example: Increase awareness/credibility about expertise in your practice area; or raise profile of specific team member	Content Marketing	YouTube video series of quick answers to general questions	Team member name(s)	Bi-monthly	Video views, referral traffic from YouTube, # Enquiries

Category	Line items	Costs	Expected ROI
Events	Example: Host two Webinars		
Website Enhancements			
Content (Blogs, video, etc.)			
Search Engine Optimization			
Email			
Social			
Search Marketing			
Traditional Marketing (print, mail, TV, etc.)			
Paid Display			
Business Listings			
Sponsorships			
Networking Groups			
Dinners/Entertainment			
Other			
Total budget:			

MARKETING BUDGET

Add some detail on how to define spend based on prior success/results, assume similar results, define expected outcomes so you can measure ROI.

Spent in prior year:	
% of prior year revenue:	
Revenue generated in prior year from marketing activities: <small>Guide point: 1-2% of revenue rule of thumb</small>	
Overall budget:	
% of revenue target:	



MAXIMIZE YOUR MARKETING

Learn how to move beyond making your marketing plan with Actionstep.

Our legal practice management software has the tools you need to get the most from your marketing strategy, whether you're just getting started or poised for big growth.

Features Include:

Webforms

Measure your firm's response time so you can increase your chance of securing new clients.

Reporting

Easily track the ROI of your marketing efforts.

Client Management

Engage with current and prospective clients at the right moments.

List Views

See all your marketing campaigns and activities at a glance.

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