

Measuring Marketing

By Sharon Berman

The results of marketing and public relations are notoriously difficult to measure, particularly in the realm of professional services. One reason is that marketing these services is a long-term, relationship-building process. For example, a prospective client may hear one of your attorneys speak, then receive your email newsletter a month later, and three months after that meet with another one of your attorneys for lunch. When that prospect finally signs up for a service, perhaps a year later, what do you measure?

There are steps you can take to capture useful information and measure your results to the extent they can be quantified. It's not rocket science; it just takes some discipline.

1. Develop a system to capture the information

Many firms have no formal method—not even a paper “tic” sheet—for tracking where their business comes from. They may capture the information for new clients, but not the equally important information on leads that don't turn into clients and referrals who call for a brief conversation but are never heard from again.

Some attorneys claim that they convert every prospect they get in front of into a client, which would make tracking new clients the same as tracking leads. However, their memory is probably selective, and if all sources of business were actually tracked, it could be eye-opening.

Consider the leads that are generated by your website and other online marketing.



Your attorneys may not have the opportunity to get in front of each one of them, yet you want to know the total number of leads generated through your site.

2. Centralize and seal your system

Tracking all sources of business requires a “sealed” environment with a centralized data recording point. That means everyone has to be aware that the firm is capturing the data and to whom it should be forwarded. Make sure everyone knows they are expected to contribute, and determine who is responsible for tracking what data. Appoint one person as the centralized keeper of the data. Communicate those expectations regularly lest people forget and you lose pieces of the puzzle. Say, for example, that you are sending out client email alerts on a regular basis. If Joe Attorney gets a legitimate lead as a result of such an alert, but does not capture the information because the prospect does not become a client, important information is escaping from the system. Miss enough tic marks and you may wrongly conclude that your alerts are not generating any interest and stop sending them.

3. Establish a baseline

Measuring anything requires a baseline. For example, an IP litigation firm may have the goal to increase its trade secret litigation work by X%, but it has no figures on the amount of work it is currently doing in that area or has done in the last year or two. How can the firm know its progress toward the X% increase without knowing the starting point? This does not mean you have to spend countless hours establishing accurate figures down to the last penny. All you need is something against which you can measure progress, even if it's your best educated guess.

4. Measure everything you can

Under ideal circumstances, new business (or additional business from existing clients) can be traced to specific marketing initiatives. For example, after one of your attorneys gives a talk or writes an article, she gets a phone call and a new client signs the engagement letter. Those one-to-one correlations are terrific, but they are not the norm. Different tactics call for different measures and measurable outcomes are not necessarily even leads. For instance, an attorney might receive a phone call or email from a referral source, client or colleague just to

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comment on a recently published article or to say thank-you for an actionable email alert. Those types of communications should also be tracked because they mean that awareness is being generated sufficient to prompt a contact. Awareness leads to top-of-mind awareness, and that eventually leads to business.

5. Measure marketing separately from sales

Another reason why it's so important to go beyond simply tracking new business is that marketing and sales are different processes. In short, the role of marketing is to get the phone to ring; once you answer it, the sales process begins. Your marketing may be working and generating qualified leads, but if your attorneys are poor closers or rain-makers, they may not be able to convert those leads into clients. If you don't track both leads and new business, you might erroneously assume that your marketing is not working when it's really your attorneys' selling skills that need polishing.

6. Commit to measuring for the long-term

Marketing a professional service is a long-term, relationship-building effort, so results need to be measured over time, say a year or longer rather than just quarterly. Start now by taking a look back at 2008. Where did your qualified leads come from? Did you embark on a consistent website optimization program in 2007 or early 2008, which resulted in more inquiries through your website? Or, were those prospects attracted by the blogs a couple of your attorneys started writing?

While there is much to be measured, some marketing outcomes will remain intangible because they are based on anecdotal or instinctive knowledge, such as some general positive feedback attorneys may be hearing about e-blasts. If a particular initiative appears not to have any concrete, measurable

results, ask yourself what the difference would be if you discontinued it. Would you be losing ground? How about reducing your visibility? If either answer is yes, then it makes sense to persist and keep an eye on future results. If the answer is no, it may be time to rethink that tactic, or try another.

Don't be discouraged by the less tangible aspects of marketing outcomes. Set up a system to track and measure what you can and be persistent in the effort.

W. Edwards Deming, father of Total Quality Management, said there can be no improvement without measurement. Measuring your marketing results is a prerequisite for leveraging what's working, so you can invest your time and resources wisely for optimal ROI. ■

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