

Holiday Marketing Strategies

Business Growth Through Gratitude

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JOHN MURPHY

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- As Founder and Owner of Safe Harbor Wills and Trusts, attorney John Murphy strives to help families protect their home and life savings from catastrophic long-term care costs. As a Practice Advisor for Atticus, he helps attorneys avoid the many catastrophes that can occur as they build and grow their law firms
- He uses his considerable experience in hosting estate planning workshops to teach others how to develop new clients and increase their revenue streams. He also draws on his own experience as someone who wanted more flexibility in his personal and professional life. To that end, he automated his systems to the extent possible and empowered his team so his firm could continue to thrive without his constant oversight





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practices and cultivate great lives



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MORE THAN JUST BEING GREAT AT THE LAW



THE GROWTH CORNERSTONES™

REVENUE, INCOME, CONTROL, FREEDOM AND IMPACT



Sharpening Focus



Attracting High Value
Clients



Building
a Great Team



Cash Flow
and Profitability

LEGAL SKILLS



EXERCISE:

- What's the most memorable holiday party you've experienced?
- What's the best or most memorable business gift you've gotten in the past?
- What's the most memorable marketing activity you've participated in?

THE OBJECTIVE: MAKE THE MOST OF THE HOLIDAYS

1

Acknowledge and show gratitude to those who have helped with making your law firm successful

2

Sharing marketing initiatives that can directly or indirectly remind your clients that you are still here

3

We will share our Atticus Gift Giving Guide so you can generate gift ideas based on passions and interests

4

Monitor trends in the marketplace that can affect your holiday marketing

PICK YOUR END-OF-THE-YEAR HOLIDAY

What end-of-the-year public/official holiday do you want to focus on?

Thanksgiving

Black Friday

Cyber
Monday

Christmas

New Years

WHY IS HOLIDAY MARKETING IMPORTANT?



Increase Brand
Awareness



Reach New Audiences



Engage With
Customers



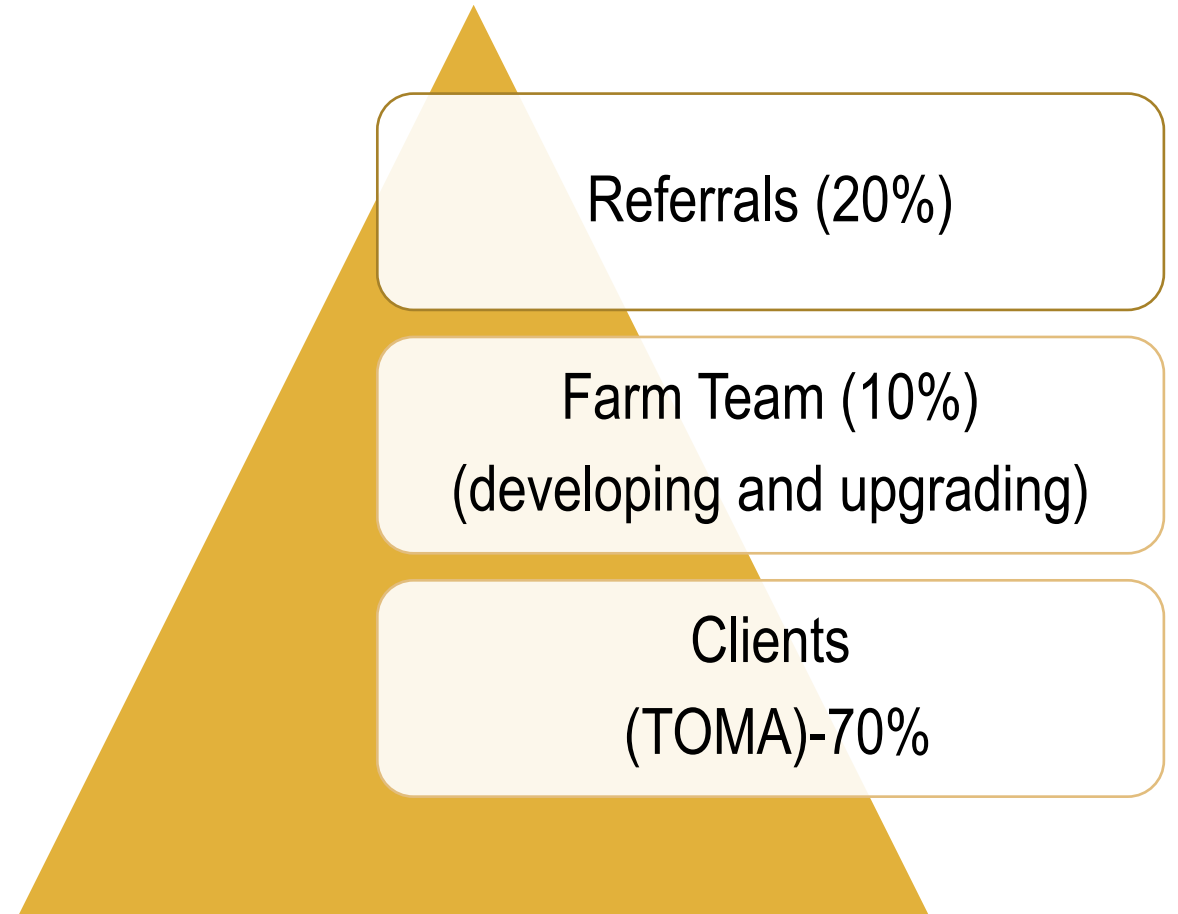
Launch New Products
And Services



GOAL #1

Acknowledge and show gratitude to those who
have helped with making your law firm
successful

- Referrals (20%) and Farm Team (10%)
 - Call them, one on one time
 - Send them a unique article
 - Help them-intros, support, books, etc.
- Clients (past and present) 70%
 - Marketing assistant or relationship manager
 - Social media
 - Email “alerts, wins, trends”
 - Invite to events-dependending on practice



TOP 20 CONSIDERATIONS:

What could you do to acknowledge your Top 20 Referral Sources at the end of this year?

Before you answer:

Think about the thousands of dollars worth of business they've sent you this year and the impact they have on your practice.

TOP OF MIND FOR ACTIVE AND PAST CLIENTS

- Depends on the nature of your practice
 - Institutional client
 - Lots of ‘retail’ clients
 - How many clients a year do you and/or your firm touch?
- Think about an annual marketing calendar process to stay in touch
 - Email-general, insider, premium
 - Social media
 - Blogs?



GOAL #2

Sharing marketing initiatives that can directly or indirectly remind your clients that you are still here



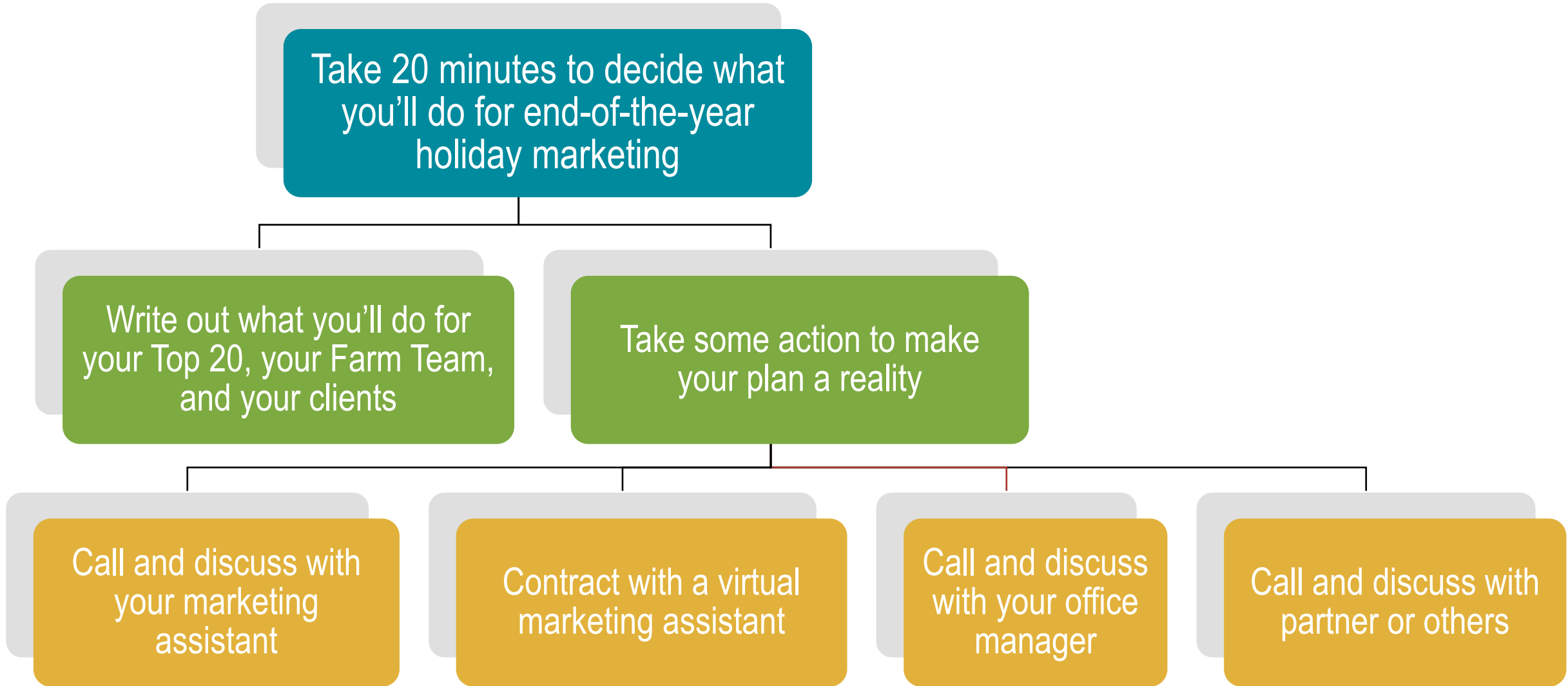
HOLIDAY MARKETING IDEAS

- Use Social Media to Promote and Engage
- Participate in Community Events
- Collaborate with a Local Charity
- Partner with Other Professionals/Businesses
- Restate or Introduce Your Referral Program
- Make a Video
- Hold a Gift-Wrapping Event
- Do a Holiday Giveaway or Contest
- Create a Holiday Guide
- Host Classes or Tutorials
- Enable Your Services to be Gifted

YOUR HOLIDAY MARKETING PLAN

	Top Twenty	Farm Team	Clients
Activities (Lunch, dinner, drinks, golf...)			
Gifts (books, gift certificates, wine...)			
Party or Group Event			

MARKETING ASSISTANCE & IMPLEMENTATION



MARKETING ASSISTANCE

How does your holiday marketing plan become a reality?

You need help!



GOAL #3

We will share our Atticus Gift Giving Guide so you can generate gift ideas based on passions and interests

GIFT GIVING IDEAS

ATTICUS GIFT GIVING GUIDE

Passion, Interest	Related Book	Related Product	In-Person Activity	Ticketed Activity	Food/ Meal	Event/ Party
History Buff	Book On Period	Print Of Period, Map	Tour Historical Locations	Give Tickets To Museum	Historically Themed Meal	Re-Enactment Event
Wine	Book On Wine	Wine/ Cheese Basket	Wine-Tasting	Wine-Tasting	Dinner With Wine	Wine-Themed Party
Reading	Hard-Bound Favorite Book	Book Stand Or Prop, Book Light Or Marker	Book Lecture	Breakfast With The Authors	N/A	Book Signing
Travel	Book On Travel	Passport Holder	Travel Together	Give Tickets For Trip	Themed Dinner	Travel Showcase
Football Fan	Book On Team	Team Merchandise	Go To Game Together	Give Tickets To Game/Skybox	Sports Bar Event	Super Bowl Party
Golf Fan	Book On Golf	Golf Merchandise	Twosome Or Foursome	Give Gift Certificate To Course	Dinner At Golf Club	Master's Party Or Tournament
Amateur Chef	Book On Recipes	Pots, Pans, I Oils, Vinegars, Herbs, Apron	Take Cooking Class Together	Give Cooking Course Gift Certificate	Fix A Meal At Home	Gourmet Dinner
Theater Fan	Book On Theater	Posters Or Memorabilia	Go To A Play Together	Give Tickets To A Play	Eat Dinner/Gift Certificate	Backstage Access
Single Malt Scotch Fan	Book On Scotch	Glasses, Or Favorite Scotch	Go To A Scotch Tasting	Tickets To Scotch Tasting	Visit Scotch Bar	Scotch Tasting Party
Likes Dogs Or Cats	Book On Breed	Toy For Pet, Gift Cert For Grooming	Pet Training Event/Class	Give Tickets To A Dog Or Cat Show	N/A	Cat Or Dog Show
Tennis Fan	Book On Tennis	Racket Cover, Balls, Accessories	Play Together	Give Tickets To A Tournament	Eat At Tennis Club	Celebration Dinner

ONLINE RETAILERS

- Uncommongoods.com
- Harryanddavid.com
- Gourmetkoshergiftbaskets.com
- Totallybamboo.com
- Masterclass.com
- Snacknation.com
- Corporategift.com
- Thebrobasket.com
- Fanatics.com
- Barkbox.com



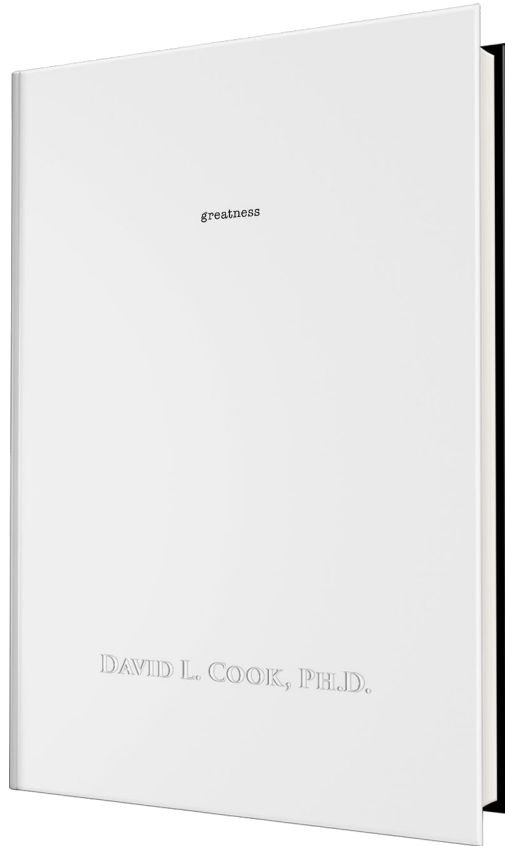
PERSONALIZATION MALL



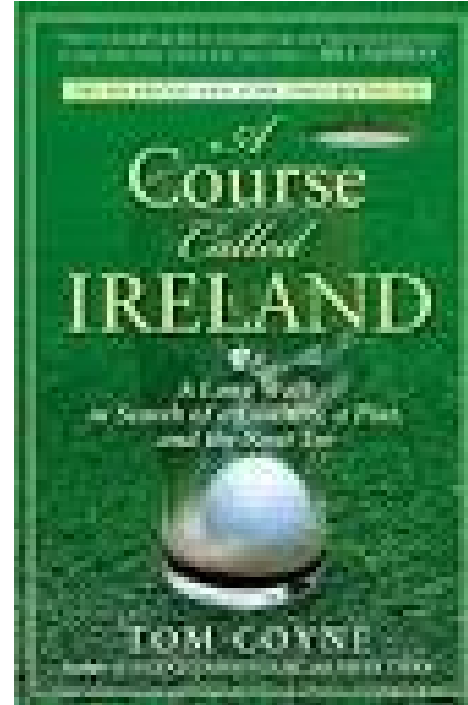
GOLF GIFTS



BOOKS & SUBSCRIPTIONS



Greatness – David L. Cook



Blinkist



GOAL #4

Monitor trends in the marketplace that can affect your holiday marketing



What's
Happening?

Inventory Shortages/Supply Chain Issues

Shipping Delays

Inflation/Rising Costs

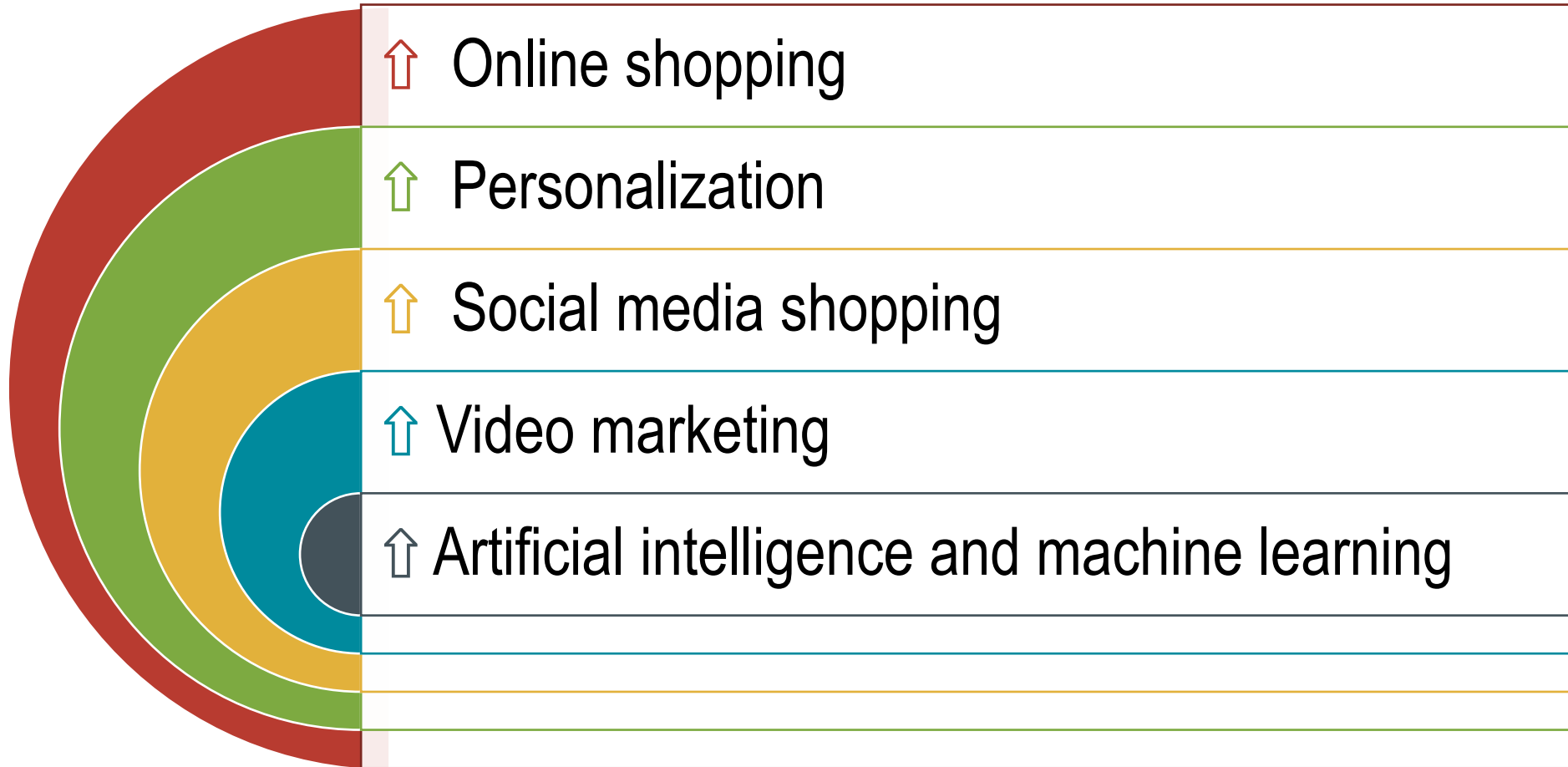
Post-Pandemic

Increased Production Time

Resource & Labor Shortages

Holiday Stress

TOP 2023 HOLIDAY MARKETING TRENDS



MAKE THE MOST OF THE HOLIDAY SEASON

Offer deep discounts

Provide flexible payment and shipping options

Have a strong social media strategy

All marketing actions are to be consistent with personal beliefs and interests

Offer free shipping

Personalize emails and newsletters

Partner with influencers

Use social proof

Run paid advertisements

Final Thoughts and Questions



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WHAT TO DO NEXT:

- Spend 20 minutes putting together your action plan
- Schedule your free consultation to further discuss your holiday marketing action plan
- Join us for an extended, 90-minute, virtual paid workshop on November 9th where we will discuss this topic in further detail

Thank you!



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