

# THE GRATEFUL LAWYER

## HOLIDAY MARKETING FOR THE SAVVY ATTORNEY

**BRENDA GEIGER**



NOVEMBER 9, 2023

# BRENDA GEIGER

## ATTORNEY & ADJUNCT PRACTICE ADVISOR

- Brenda Geiger is the founder and CEO of Geiger Law Office, P.C., a trusts and estate planning law firm. The firm has helped over 5,000 families through innovative estate and asset protection strategies
- She is a sought-after speaker, Atticus coach and attorney on a variety of business, estate and asset protection topics
- She has authored 7 books on various legal topics related to estate planning and has built a successful multi-office firm in southern California over the last 16 years





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We help lawyers grow great  
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

# 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/Prospects



Engage With Existing  
Clients



Launch New Products  
And Services



# WORKSHOP OBJECTIVE: CREATE YOUR HOLIDAY MARKETING PLAN

1

Raise your firm's  
Top-of-Mind  
Awareness level  
with past clients  
and referral  
sources

2

Invest in marketing  
activities that will have  
a generous ROI

3

Think through gift  
giving ideas based  
on trends in the  
marketplace

4

Track referrals and  
create your  
marketing plan

# EXERCISE:

- Do you have a holiday marketing plan in place?





# GOAL #1

Raise your firm's Top-of-Mind Awareness level with past clients and referral sources

# TOMA

## Top of Mind Awareness

# Top 20 Exercise



Instructions: Complete the exercise below to determine where to focus your Top 20 efforts.

Referral Source by Name	Potential A-B-C-D	Actual A-B-C-D	Rapport A-B-C-D	Last Contact	Type of Person
	A <input type="text"/>	A <input type="text"/>	A <input type="text"/>		
	A <input type="text"/>	A <input type="text"/>	A <input type="text"/>		
	A <input type="text"/>	A <input type="text"/>	A <input type="text"/>		
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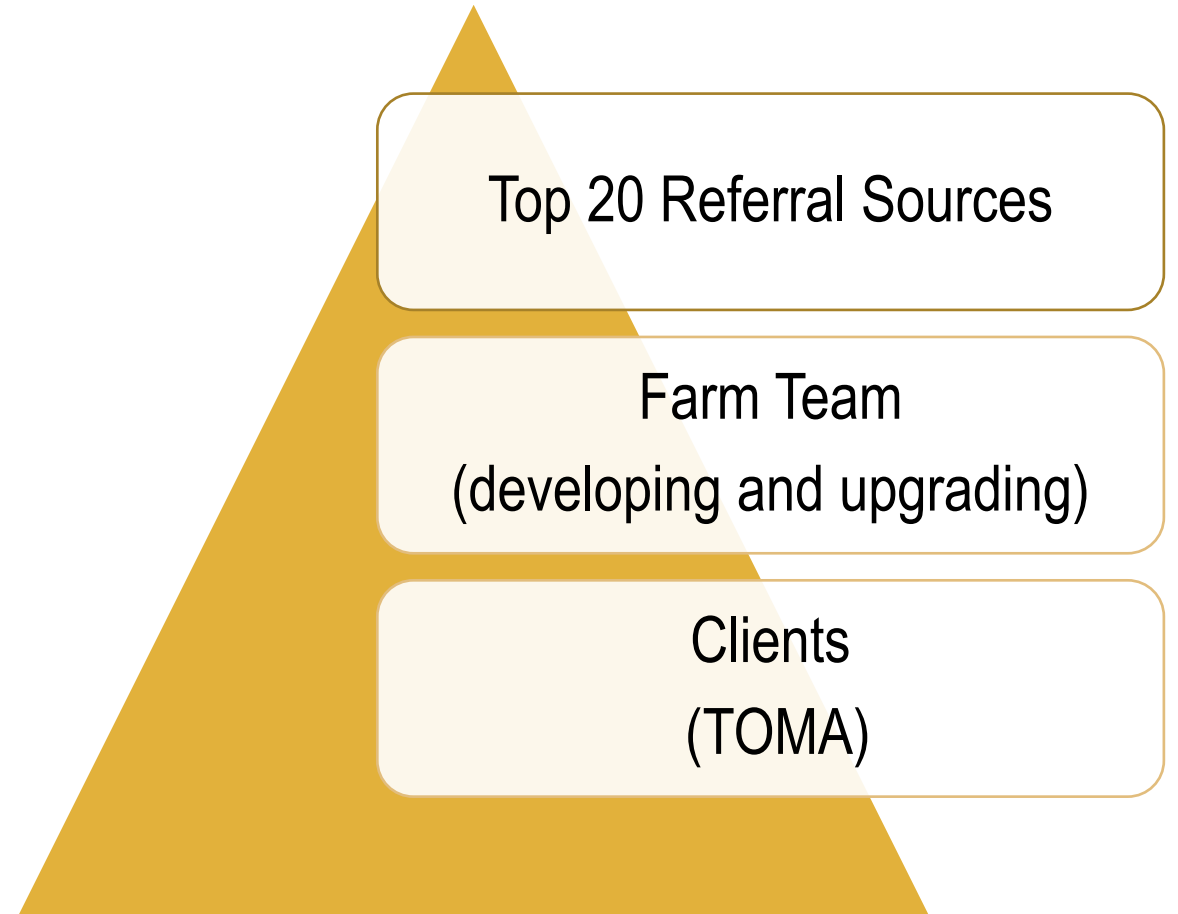
# TOP 20 CONSIDERATIONS:

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 20 Referral Sources and Farm Team List
  - Call them, one on one time
  - Send them a unique article
  - Help them-intros, support, books, etc.
- Clients (past and present)
  - Marketing assistant or relationship manager
  - Social media posts, e-mail newsletter
  - Special email “alerts, wins, trends”
  - Invite to events-dependending on practice area



# TOP OF MIND FOR ACTIVE AND PAST CLIENTS

- Think about creating an annual marketing calendar process to stay in touch in preparation for 2024:
  - Email Newsletter (how frequent will you send it, how long will it be, who will be in charge of curating it, Constant Contact and MailChimp are two of the easiest and least expensive options)
  - You could send a text alert to your clients regarding year-end planning, or an opportunity to contact your firm for a free checklist or tool or send an invitation to an event like a holiday open house (Constant Contact, EzTexting, Textedly, SimpleTextin, ect.)
  - Social media posts with helpful content
  - Video content posted to YouTube with helpful content
  - Blog posts on your website (an advanced technique is to have a video of the blog post next to the blog post)



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## **GOAL #2**

Invest in marketing activities that will have a generous ROI

# Holiday Marketing Activities

Offer appointments locking in 2023 pricing

Promote flexible meetings on Zoom, conference call or in person for year-end planning

Create a strong social media strategy (have a team member posting on a regular cadence)

Create a Year-End Planning Checklist and promote it to clients and send it to referral sources

Create a fun holiday card with pictures of your team to send to clients and/or referral sources

Personalize emails and newsletters (advanced: use app like Loom to create a video email)

Partner with referral sources to host a holiday open house

Use social proof through strategically asking clients for Google and Yelp reviews

Run paid advertisements on Facebook or YouTube



# 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 on Something Helpful
- 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
- Host a cocktail party

# ADDITIONAL SUPPORT: EVENT MARKETING FORMS

**General Event Planning Tip Sheet**

**FORM 21.00**

**Purpose:** \_\_\_\_\_

**Location:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**List #1 -- What You Need TO BUY/RENT (Select appropriate items)**

<ul style="list-style-type: none"> <li><input type="checkbox"/> Invitations</li> <li><input type="checkbox"/> Centerpiece(s)</li> <li><input type="checkbox"/> Scented Candles</li> <li><input type="checkbox"/> Tables/Chairs</li> <li><input type="checkbox"/> Space (Hn, Of, Hotel)</li> <li><input type="checkbox"/> Name Tags/Table Tents</li> <li><input type="checkbox"/> Entertainment: Pianist, Harpist, Carolers dressed like Dickens-era (high school/college), or a visit from jolly ole Saint Nick</li> </ul>	<p>FOOD should reflect abundance and luxury. Holidays are a time to indulge. Do NOT skimp on your menu!</p> <p>Consider:</p> <ul style="list-style-type: none"> <li>whole tenderloins</li> <li>the finest glazed ham</li> <li>fresh smoked turkey</li> <li>sides of salmon</li> </ul> <p>Check to see if a good local caterer is available to prep &amp; serve the food.</p>	<p>DRINKS: (Full serve or self-serve bar)</p> <p>Consider:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Wine</li> <li><input type="checkbox"/> Cocktails</li> <li><input type="checkbox"/> Specialty coffee/teas</li> <li><input type="checkbox"/> Egg Nog</li> <li><input type="checkbox"/> Hot Apple Cider</li> <li><input type="checkbox"/> Soft Drinks</li> <li><input type="checkbox"/> Spring/Tonic Water, Club Soda</li> </ul>
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**List #2 -- What You Need TO DO BEFORE the Party (if applicable)**

<p><b>30-60 days in advance...</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Determine location &amp; date</li> <li><input type="checkbox"/> Select/Order ALL items needed from List #1 above</li> <li><input type="checkbox"/> Develop the guest list (see your Top 20 Roster &amp; 21.01)</li> <li><input type="checkbox"/> Choose/hire/meet ALL help</li> <li>3 - 4 weeks out:</li> <li><input type="checkbox"/> Buy/submit/print invitations</li> </ul>	<p><b>2 weeks in advance...</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Wrapp gifts</li> <li><input type="checkbox"/> Schedule a massage for the day of your party</li> <li><input type="checkbox"/> Schedule appt with hair stylist</li> <li><input type="checkbox"/> Purchase/rent party attire</li> <li><input type="checkbox"/> Order flowers</li> </ul>	<p><b>1 - 5 days in advance...</b></p> <ul style="list-style-type: none"> <li>5 days out:</li> <li><input type="checkbox"/> Courtesy call to those who haven't RSVP'd</li> <li>1 - 2 days out:</li> <li><input type="checkbox"/> Set up room</li> <li><input type="checkbox"/> Pick up pre-ice centerpieces</li> <li><input type="checkbox"/> Out checks for help. Get cash for tips.</li> </ul>
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**List #3 -- What You Need TO DO THE DAY OF the Party**

<ul style="list-style-type: none"> <li><input type="checkbox"/> Relax - Try a massage!</li> <li><input type="checkbox"/> Get hair out styled.</li> <li><input type="checkbox"/> Get dressed a couple of hours before guests arrive.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Ask guests about hobbies, family, pets, current events, a film, movies, an art exhibit</li> <li><input type="checkbox"/> Listen, make eye-contact, look interested, compliment others. Tell a funny story.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> DO NOT permit clean-up until guests have left. It will make guests uncomfortable and ruin the atmosphere of the party!</li> <li><input type="checkbox"/> Go to bed and sleep in!</li> </ul>
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**Firm Open House**

**FORM 21.03**

**WHAT AND WHY**

The purpose of a firm open house is to show off new or remodeled office space; to showcase new technology; introduce a new attorney you recently hired; a chance for your partner's Top 20 to meet your Top 20 and cross-sell; celebrate an award or special recognition

The purpose of this event is to build know, like, trust and rapport with your influencers.

**WHO TO INVITE**

Your invitations can be written or verbal, and should be made at least two weeks prior to the event. Ask your invitees to RSVP at least three days prior to the event so that the food orders can be adjusted. Invited guests include your Top 20 List, other attorneys, staff with whom your firm often works, judges, bar officials and selected clients.

**WHERE**

Hold the open house at your law firm. After all, the reason you hold an event like this is to bring people to your office. Use your conference room to set up drinks and/or finger foods. Your food and beverages can be catered for a formal effect or homemade if you prefer a casual approach.

**WHEN**

Typically during the work week between the hours of 4 PM-6 PM. Invite people to stop by after work. Wrap things up by 9 PM-10 PM. The idea is to maximize the number of people you can accommodate over a 3-4 hour period of time. Remember to read through your notes before the event to refresh your memory of spouses' names, kids' names and sports affiliations. You want to be able to converse with referral sources having the right information at hand.

It's also a good idea to sit down with your partners (if you have them) in advance of this gathering and strategize with them about who you'll introduce to them. Discuss who you'd like to introduce to your partners and discuss who they'll introduce to you to maximize any cross-selling opportunities.

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**Holiday Event**

**FORM 21.04**

**WHAT AND WHY**

A holiday event is a festive celebration that helps spread good will and cheer. It is ideal for positioning the law firm positively in the community and enhancing its image.

The purpose of this event is to build "know, like and trust" with influencers.

**WHO TO INVITE**

Invited guests can include your Top 20 List, other attorneys, judges, bar officials, physicians, CPA's, small business owners, staff, and family members. Inviting spouses is optional, depending on the size of your group.

**WHERE TO HOST YOUR EVENT**

You can host your event at your firm, a club house or your home. Choose a spot that will allow enough room for mingling comfortably with your guests. You don't have to restrict yourself to indoor locations during the warmer seasons. Many firms have hosted picnic events for the 4th of July in public parks. Other firms have hosted barbecue events in large tents in their parking lots, complete with musical entertainment and games. Some law firms "piggy back" onto public events by inviting guests to view parades from their offices or park in their parking lot for easy access to other events, such as an art festival or concert in a nearby park.

**WHEN TO HOST YOUR EVENT**

Once a year during the holiday of your choice. Since so many firms focus on Christmas, choosing another holiday will allow you to stand out. An event to welcome the New Year is an option, along with President's Day, Valentine's Day, Memorial Day, the 4th of July or Labor Day. Thanksgiving events are also popular, scheduled before the actual holiday. (Many firms also opt to send Thanksgiving cards instead of Christmas cards because they want their card to stand out from the rest.)

**HOLIDAY FOOD IDEAS**

Talk to several catering companies in your area to see what they can provide, or opt to cater it yourself if your team has the time and talent.

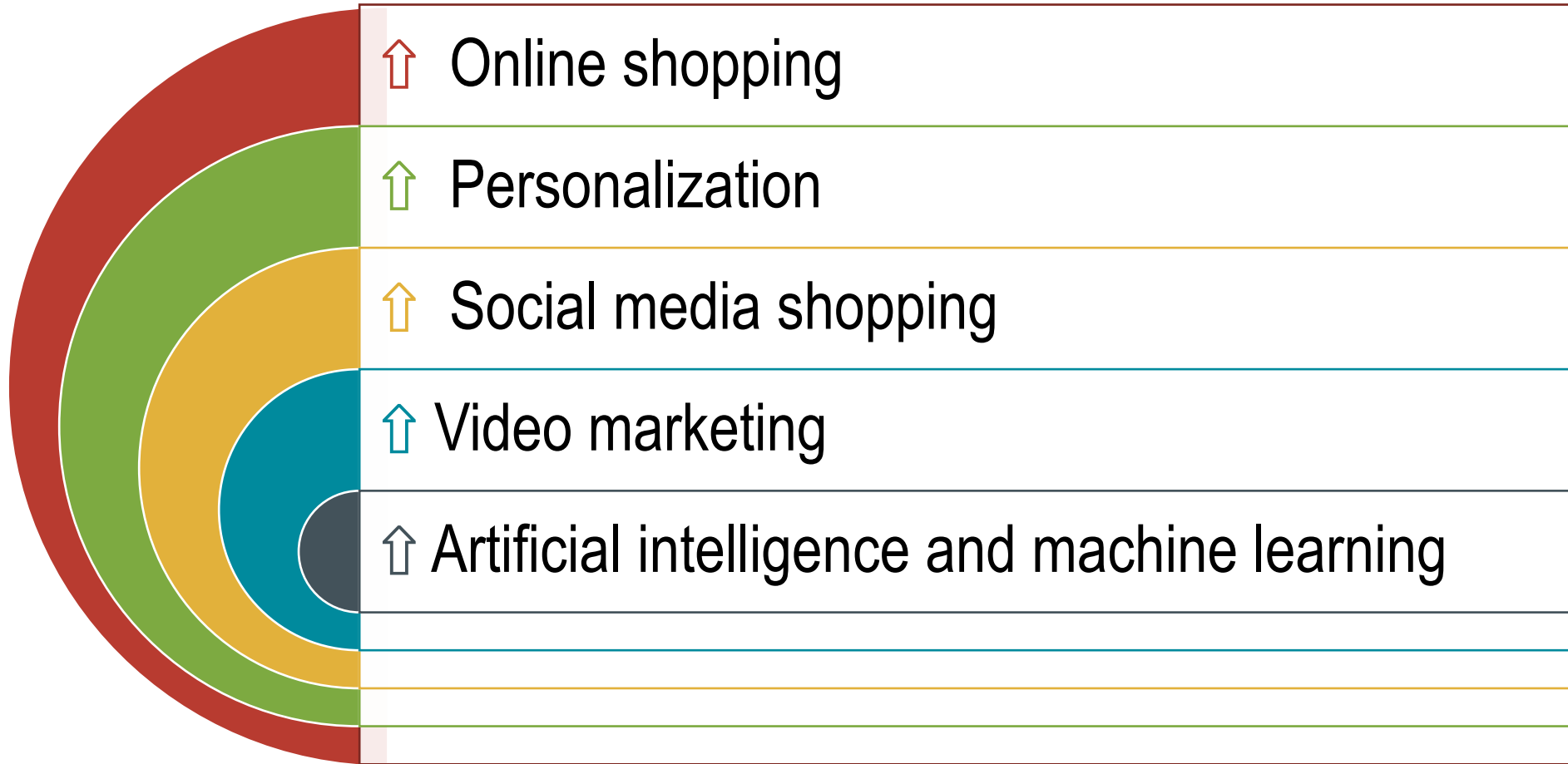
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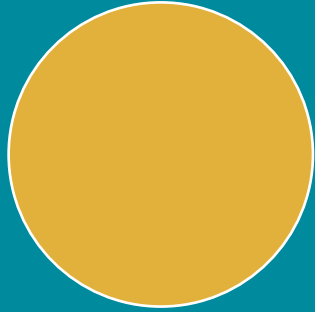
## GOAL #3

Think through gift giving ideas based on trends in the marketplace

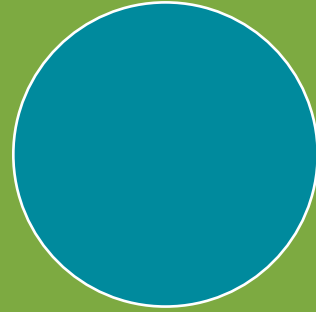
# TOP 2023 HOLIDAY MARKETING TRENDS



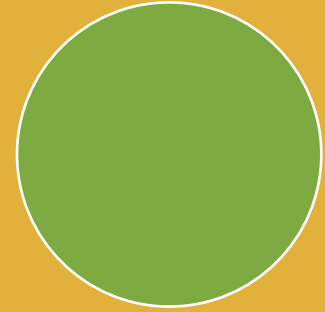
# INCREASE IN PERSONALIZATION



AI is being used to increase personalization in the online shopping experience. Consumers are looking for recommended products, offers, tailored ads, and loyalty rewards.



According to Forbes.com, “Data shows 75% of shoppers are willing to pay more for personalized online shopping experiences.”



According to the US Chamber, “This year, 69% of shoppers expect retailers to provide more personalized offers in addition to good deals and cost savings.”

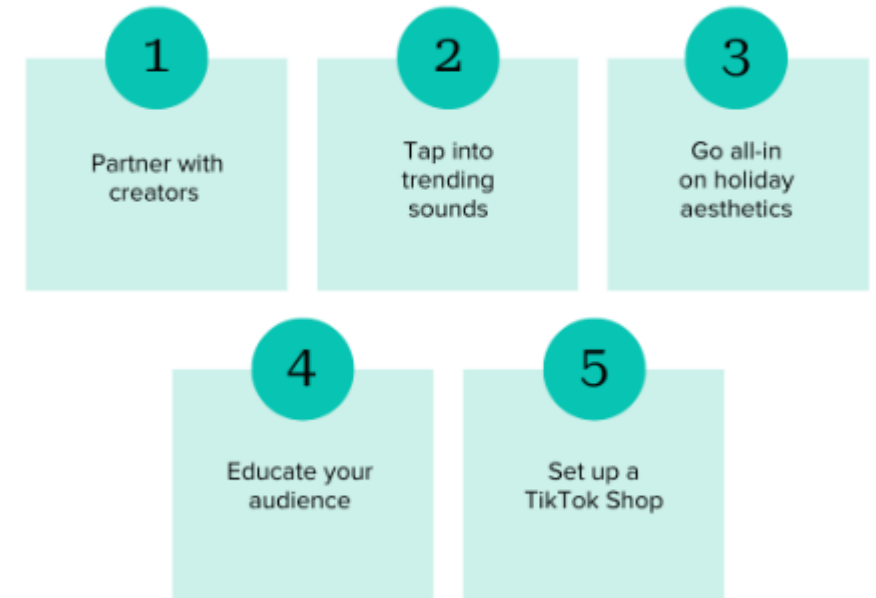




# SOCIAL MEDIA SHOPPING

According to LinkedIn, “Insider Intelligence predicts social commerce to grow by nearly 30% this year, much of it thanks to the increasing popularity of TikTok. Social media will also be an important channel to influence purchase decisions.”

## Guide to TikTok marketing this holiday season



[sproutsocial.com/insights](https://sproutsocial.com/insights)

**sprout**social

# VIDEO MARKETING

What's trending in video this year

Instagram Reels

Video advertising-  
think FB and  
YouTube

Horizontal videos

Demonstrating  
features and  
benefits of your  
services

Testimonials from  
clients

Educating  
consumers

Using relevant  
keywords, tags, and  
hashtags in  
descriptions

High-quality videos  
with good audio

Short, but engaging,  
videos

# ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING

According to Salesforce, “17% of consumers have used GPT for product research and inspiration, and 10% will likely use it to help build their holiday shopping lists.”

They continued to say that AI-generated product recommendations are being used by e-commerce merchants, which allow them to personalize the shopping experience.

AI is going to give companies a competitive edge this year as well.

# APPLYING 2023 HOLIDAY TRENDS TO YOUR LAW PRACTICE

- Find new ways to promote your services
- Bundle your services
- Reward those who refer you
- Understand your customer so you can build a successful marketing strategy
- Meet your customers at the right moment
- Create blog posts around protecting your identity online during the holidays
- Use Instagram and TikTok to share behind-the-scene videos, testimonials, Q&A, or discussing your services
- Run a giveaway or contest
- Be active and engaging on your social media accounts
- Confirm that your website has a seamless checkout process (if applicable)

# 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, 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](http://Uncommongoods.com)
- [Harryanddavid.com](http://Harryanddavid.com)
- [Gourmetkoshergiftbaskets.com](http://Gourmetkoshergiftbaskets.com)
- [Totallybamboo.com](http://Totallybamboo.com)
- [Masterclass.com](http://Masterclass.com)
- [Snacknation.com](http://Snacknation.com)
- [Corporategift.com](http://Corporategift.com)
- [Thebrobasket.com](http://Thebrobasket.com)
- [Fanatics.com](http://Fanatics.com)
- [Barkbox.com](http://Barkbox.com)





## GOAL #4

Track referrals and create your marketing plan



# TRACKING REFERRALS

1. Who are your referrals
2. Referral Tracking System
3. Measure and set goals

# WHO ARE YOUR REFERRAL SOURCES?

## Clients

- A satisfied client is a walking advertisement

## Current Referral Sources

- Keep rapport and contact consistent and nurture these individual

## Potential Referral Sources

- Other attorneys
- Related professionals, such as CPAs, Financial Advisors, Doctors, Insurance
- Agencies, facilities, groups, individuals, boards, charities, etc.

## Friends, Family & Acquaintances

- Don't assume they know what you do or that they will remember

# GATHER & TRACK YOUR INFORMATION

## Referral Source Manager



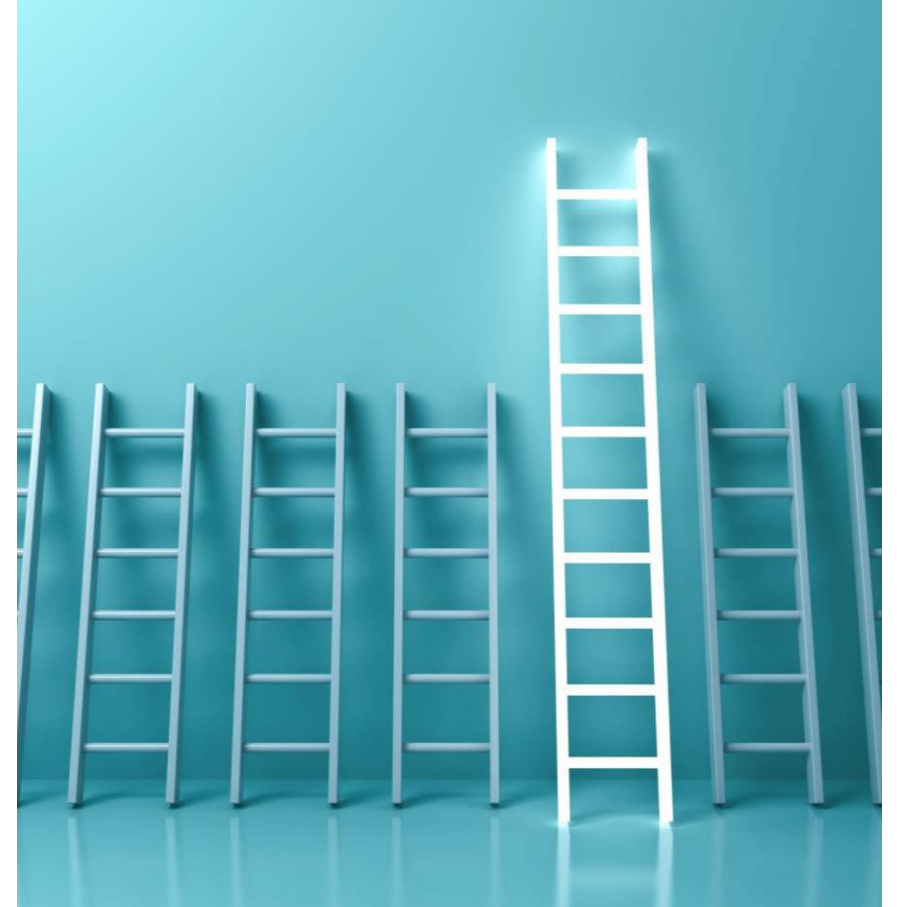
Instructions: Create a profile for a referral source on the left side and track your history of contact, including who they referred and the type of thank you sent to build rapport with this source and remain "top of mind."

CONTACT INFORMATION		CONTACT HISTORY			RECORD OF REFERRALS						
Personal Information		Type of Activity?			Retained?					Type of Thanks?	
		Date	Choose from menu	Tickler	Referred In	Date	Y	N	M	Rank	Choose from menu
Influencer:											
Nickname:											
Secretary/Asst:											
Firm/Company:											
Office Address:											
City, State Zip:											
Email:											
Phone:											
Fax:											
Home Address:											
City, State Zip:											
Email:											
Cell:											
Phone:											
Fax:											
Personal Profile											
Birthday											
Anniversary											
Spouse											
Child #1											
Child #2											
Child #3											
Hobbies											
Sports											
Interests											
Education											
Experience											
Fav Restaurant											
Fav Restaurant											
Fav Restaurant											

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# MEASURE AND SET GOALS

- How many referrals per month are you receiving?
  - Are you tracking your prospects?
  - By the name of the prospect?
  - By referral source type: past client, attorney, CPA professional, etc.
- Do you know how many great referral sources you have?
- How many marketing contacts per week are you reaching out to?
- Do you have an assistant helping you with this?
- Make sure to set goals and measure your progress



# Create Your Holiday Marketing Plan

Take 20 minutes to decide what you'll do for end-of-the-year holiday marketing

Write out what you'll do for your Top 20, your Farm Team, and your clients

Take some action to make your plan a reality

Call and discuss with your marketing assistant

Contract with a virtual marketing assistant

Call and discuss with your office manager

Call and discuss with partner or others

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

# Final Thoughts and Questions



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## WHAT TO DO NEXT:

- Spend time putting together your holiday marketing action plan
- Schedule your free consultation to further discuss your holiday marketing action plan
- Join us for a free, 45-minute webinar on goal setting and put your action plan to use

Thank you!



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# SOURCES

- <https://www.linkedin.com/pulse/edition-3-top-shopping-trends-expected-holiday-season-jivox/>
- <https://www.forbes.com/sites/kaleighmoore/2023/08/22/retailers-focusing-on-personalization-before-holidays-report-shows/?sh=307be91326a8>
- <https://www.uschamber.com/co/good-company/launch-pad/holiday-season-sales-trends-for-marketers>
- <https://sproutsocial.com/insights/holiday-marketing/>
- <https://www.forbes.com/sites/theyec/2023/03/24/video-marketing-trends-that-you-cannot-ignore-in-2023/?sh=15cbff4e5aac>
- <https://www.linkedin.com/pulse/role-video-marketing-2023-digi-venders/>