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MARKETING MAILINGS

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At various times your firm will have the need to communicate with existing and potential clients. This could be to draw attention to a specific changes or improvements to your services eg: the opening of a new office, or the provision of a new service. One way, and probably the simplest way, is to write to these groups informing them of your plans.

These mailings are not related to specific client matters, and are generally termed Marketing mailings. We have attached a couple of examples of typical mailings, to illustrate some of the points we have made.

Marketing Mailings should be an integral part of any firm's marketing activity. Often, however, firms shy away from mailing programmes, because :

- The firm lacks a central database; or
- Departments don't trust each other to mail "their" clients; or
- The firm feels mailings will appear as marketing junk mail.

It is perfectly feasible to design mailings which clients will view as letters addressed to them in particular, and not as part of a de-personalised programme.

It is also quite clear that potential clients eg residents of a new housing estate, can receive relatively simple mailings, and can be treated differently to existing clients, with whom a more complex set of parameters will apply.

Prior to beginning a programme of mailings, firms need to establish some strict principles, otherwise the programme falls apart and into disrepair and disrepute. These principles are, in the jargon, called 'Mailing Protocols'.

MAILING PROTOCOLS

OWNERSHIP

Ownership of the client

Each existing client must be "owned" by a named individual in the practice, whose approval is required prior to a mailing. That person also determines on what subject matter the client can and cannot be mailed.

That individual also has responsibility for the accuracy of the client details which appear in the database.

Ownership of the List

When a firm creates a database, it immediately creates a need to ensure the details on the database remain accurate. No database will remain accurate over time without being updated. Probably the biggest single issue with regard to mailings relates to maintaining the accuracy of the data.

Mailing a deceased client is the ultimate sin, but there are others, for instance mailing a conveyancing client at their former address, even if your firm effected the sale and purchase.

Firms must have incredibly clear and robust rules as to who is responsible for accuracy of data. Firms in the past have made the fundamental mistake of employing an external marketing agency to run a mailing programme, and provided the agency with an accurate list of clients at the outset, but effectively abdicated responsibility for list accuracy to the agency, who were not in a position to ensure accuracy over time.

Whoever physically carries out the mailing, responsibility for list accuracy must remain within the firm, and with named individuals.

Ownership of the process

A common pit-fall is that mailing activity is uncoordinated. A very simple and effective rule is to appoint a “Mailings Gate-keeper” who has responsibility for monitoring the whole process and who stops inappropriate mailings, and, as it were, keeps the process sane.

No mailings would be permitted without the Gate-keeper’s say so.

It is particularly important to have one individual (or a committee) oversee the whole programme with regard to mailing potential clients, who in effect, are not “owned” by individuals within the practice. Existing clients will usually have their owner, protecting them from inappropriate mailing activity.

STYLE, AND WHAT CAN BE MAILED

Having decided to have marketing mailings, it is very important to agree a House Style, and to stick to it i.e. the look of the mailing, the page layout, the salutation and sign off style, etc, all need to be consistent.

The firm needs to decide what is permitted to be in a mailing. A simple letter? A letter with a leaflet? Some firms protocol excludes any Marketing material, and insists all communications should be proper letters.

Whose name will appear at the bottom of the letter? For each client, the firm needs to decide if all communication will be from the same individual, or will the firm permit different individuals to mail a client.

FREQUENCY

A very important protocol is deciding the minimum mailing interval. By this is meant: do not mail clients too frequently. Some firms have a policy, for example, that there must be a minimum of 2 months interval between mailings which are not specific to a particular client matter.

It is vital to agree this protocol, as it is a very important means of re-assuring colleagues that their clients will not be bombarded with mailings, and persuading colleagues to "buy into" the mailing programme.

THE TOOLS

Firms do not need to purchase a proprietary package to begin mailing programmes.

It is quite possible to run a series of mailings using:

- The "Mail Merge" facility in Microsoft Office; and
- A database created in Excel or Access (or similar); and
- Letter templates created in Word (or similar).

The database can be as simple as name, address, salutation, although the addition of more personalised information is better.

There is also the address label print facility available.

LETTER LAYOUT

Attached are two examples of typical mailing letter layouts. The letters we have created are compatible with the above, and in the sample letters provided, the words surrounded with <> (for example <Client Name>) are those that you can use as merge fields with your database. You will see that we have included some merge fields in the body of the text of the letters. These can help to increase the personalised feel of the letters.

It is very much the case that the attached sample letters are examples only. Your mailings will benefit from you including relevant additional or local information. Letters will be more effective the more specific and personalised they are. Therefore, some simple guidelines are:

- All letters should be to named individuals.
- Each letter should have a named salutation ("Dear Mr Jones", or "Dear Jane"), never "Dear Managing Partner" or equivalent.
- If at all possible, restrict the letter to a single page.
- Ensure the font and font size used are the same in your draft letter and in your Excel spreadsheet.
- Do not try to cram too much detail in the letter. Your objective is to inform the recipients at an early stage, not to fill in all the details at the beginning.
- If you can, include some information specific to the recipient. An example could be "You have been a valued client for X years, and…." or "Our two firms have co-operated in many conveyancing transactions over the past X years, and…."
- Sign each letter personally if possible.

- Consider what action you wish to induce. Is it to have the recipient contact you (in which case, name the individual they should ask for), or is it to agree to a meeting, or is it simply to be pre-disposed to you?

- Ensure you include a means of response, eg "Fax Back to…", or "call me on…", or "email me at…"etc.

IN SUMMARY

So long as a firm has clear and unambiguous lines of responsibility mailing programmes can be very effective and free of pit-falls. The key to stress-free mailing activity is to put in place procedures that avoid potential problems, and then stick to those procedures.

LawGroup UK
1 Shorrolds Road, London, SW6 7TR
DX: 153980 Fulham 3
T: 0845 389 0385 F: 0845 389 0386
info@lawgroup.co.uk
www.lawgroup.co.uk