Clio Cloud Conference

# How to Generate More Business with Email

MAKE YOUR MARK

THE NO.1 CONFERENCE IN LEGAL


## Patricia De Fonte

**Founder,**

**De Fonte Law PC**
**Estate Planning With Heart™**



## Milly Tsui

**Marketing Automation Manager**

**Clio**

Save time

Secure leads

Generate more revenue

# Agenda

**Audience:** Who is your ideal audience?

**Content:** What should you send to your audience to achieve your email goals?

**Timing:** When is the optimal delivery time and cadence?

**Tools:** How to use Clio Grow to support email marketing

# Audience

Who is your ideal audience?

# Who is your ideal audience?

**Breaking down your database into groups with similar behaviours or traits in order to personalize emails. Sending personalized content can help improve the overall success of a campaign**

**Personas:**

- Current Clients
- Former Clients
- Potential Clients
- Referrals
- Influencers

**Behaviour:**

- Website visitors
- Past purchasers
- Content interest
- Reviewers

**Demographic:**

- Region
- Age
- City
- Education
- Job function

# Here are the main audience buckets that law firms can focus on

**Potential Clients:**

People who have been referred to you and/or people who have engaged with you but haven't yet become a client.

**Current Clients:**

People you currently work with or have worked with in the past

**Influencers/ Gatekeepers:**

People or organizations who might be able to support your firm but aren't prospective clients.

## Content

What should you send to your audience

to achieve your email goals?

# Email Goals:

- Drive new revenue
- Drive repeat revenue
- Increase firm awareness

# Creating content for your emails

Creating email content to support your goals.

# Drive New Revenue

**Send the following to *<u>Potential Clients</u>* to keep your law firm top of mind**

- Helpful industry news
- Guides / webinars
- Check-ins

**PDL Phone Call Follow up 2 - one month later ABA workbook** *Other* Edit Delete

☑ **Automatically CC everyone assigned to the matter**

**Default for**
*None selected*

**Greeting**
Dear [First Name]

**Subject**
Every Adult Needs An Advance Health Care Directive

**Body**
When we spoke about a month ago, we talked about the importance of an advance health care directive. Every person 18 and over needs a health care directive to make their wishes known and give the right person the authority to act for them if the time comes.

Many of my clients have found the attached worksheet, developed by the American Bar Association, to be very helpful in gaining clarity on their own wishes, and starting what might be a difficult conversation with loved ones.

De Fonte Law PC practices Estate Planning With Heart. We would value the opportunity to work with you.

**If you would like to schedule your first two-hour appointment with us, please reply to this email. Our intake forms are attached and take less than an hour to complete (don't return them via email!) You don't need to know all of the answers to get started, you just need to be ready to begin.**

Potential Client Phone Call Follow Ups Edit Delete

**Email** PDL Phone Call Follow up 2 - one month later ABA workbook *Scheduled for: 1 Month(s) after creation*

**Email** PDL Phone Call Follow Up 3 - three months later EP Decisions come from the heart *Scheduled for: 3 Month(s) after creation*

**Email** PDL Phone Call Follow Up 4 - six months later Avoid Probate *Scheduled for: 6 Month(s) after creation*

**Email** PDL Phone Call Follow up 5 - one year later FINAL CONTACT *Scheduled for: 12 Month(s) after creation*

# Drive Repeat Revenue

**Send the following to *Current Clients* to maintain relationship with your clients**

- Check-ins
- Important reminders
- Holiday wishes

Post Signing Emails ✎ Edit 🗑 Delete

**Email** PDL Client 5.2 Tell people where your stuff is *Scheduled for: 3 Day(s) after creation*

**Email** PDL Client 5.1 Digital Assets *Scheduled for: 1 Week(s) after creation*

**Email** PDL Client 5.3 Advance Health Care Directive *Scheduled for: 2 Week(s) after creation*

**Email** PDL Client 5.5 Long Term Care Insurance *Scheduled for: 1 Month(s) after creation*

**Email** PDL Client 5 Funding Follow Up Note *Scheduled for: 3 Month(s) after creation*

**Email** PDL Client 6 One Year Follow up *Scheduled for: 12 Month(s) after creation*

**Email** PDL Client 7: Two Year Follow Up *Scheduled for: 24 Month(s) after creation*

**Email** PDL Client 8 Three Year Follow Up Request for Meeting *Scheduled for: 36 Month(s) after creation*


## So Many Horror Stories

Owning real estate in California is not a simple matter. In the Bay Area's highly competitive and quickly appreciating market, homeowners often make mistakes.

Have you done all you can to protect your home and family? Are you maximizing the benefits of real estate ownership, or are you putting your legacy at risk by failing to take the necessary steps to protect your investment?

Consider these horror stories:

- A homeowner rented their condo via Airbnb. They returned home to find a meth lab in the bathtub. Did insurance cover that? Did the LLC they created online without an attorney limit their liability?
- Three-unit condo building and one of the owners dies without an estate plan. What recourse do the remaining tenants have during the two years the unit was held up in probate? Were they able to refinance or sell during the time the third unit was subject to probate?
- A homeowner has an income-producing property in Berkeley that is rented to rowdy college students. How can their primary residence be protected from potential liability in Berkeley?
- A couple purchased real estate before they were married and held it as tenants in common. They did not know that they could change the title to community property with rights of survivorship to receive a "double step up" in basis while preserving their Prop. 13 property tax assessment.
- A couple has an estate plan that leaves their primary residence to their eldest, and a vacation home to the younger sibling. In light of Prop 19, is this "fair"?

Warm regards and good health,

Patricia De Fonte

# Increase Firm Awareness

**Send the following to *Influencers/Gatekeepers* to expand your network Check-ins**

- Referral program
- Guides / webinars

# The Apple Pie Tree

**De Fonte Law PC's periodic newsletter to the professional community. If you would like to also subscribe to the client-facing newsletter, please email info@defontelaw.com or sign up at our website.**

## The Employee Benefits Package Can Drive Business

The recession looms large. Even people with substantial salaries are pulling back on spending.  Putting off getting great insurance, getting an estate plan, and managing your investments is never a great place to cut corners. What can we do as our client's trusted advisors to help them maximize the rewards they are entitled to but might not be aware of?

We ask all of our clients to review their employee benefits package with their financial advisor and they are usually thrilled with what they find.

My firm works with a lot of people in the tech industry.  Their benefits packages often include legal benefits, family savings accounts, and more "Easter eggs".  These are some benefits that I often see:

> **"Free" Estate Planning:** Typically, the client pays nothing and the plan pays the attorney approximately $700 for a basic plan with a revocable trust.  The attorney does not spend much time with the client.  I am not a member of any of these legal plans.  These plans can be terrific for people who do not own real estate, do not have children, and do not otherwise have fragile beneficiaries.
>
> **Reimbursement for Estate Planning:** Lately I saw the reimbursement worksheet for an employee at Google. We determined that she was eligible for a reimbursement of **$2200** (for either a single person or a couple)! This is a huge increase in what I had seen to date, which was typically $1000 for a couple, and half of that for a single person.

Let your clients know that they should speak to their Human Resources Department about their legal benefits.  If they are curious about estate planning, they can always attend one of my workshops or contact my office here.

Warm regards and good health,

*Patricia De Fonte*

**Principal, De Fonte Law PC**

she/her, #BlackLivesMatter, #LoveisLove, #Women'sRightsareHumanRights, #FamiliesBelongTogether, #StopAsianHate, #ruthless

## Do You want to Co-host an Event or Recorded Panel Discussion?

I love providing education events, panels, and workshops. Do you professionally or personally want to co-host an event? Let's connect! Please contact me and I am sure we can find time on the calendar.

## My Latest Recording


Mina Kuper is the host of the podcast *Listed by Mina Kuper*. On July 7th, I joined Mina Kuper and Armine Baltazar to talk about emotions through divorce, and the process of estate planning. Everyone has an estate plan provided by the state they live in. The estate plan set by the state decides by bloodline who gets your items and control of your finances if you are unable to take care of yourself or pass away. The way you avoid this default plan is to sign legal documents that give the people you trust the authority to do exactly what it is they want you to do. Explore the entire recording here.

## Upcoming Events

NATURAL RESOURCES pregnancy + parenting

Wednesday July 20th, 6:30 PM, Online,
Natural Resources
Estate Planning Fundamentals for Parents
Virtual Workshop

**Greeting**

Dear [First Name],

**Subject**

How De Fonte Law PC Works With Financial Advisors

**Body**

I am always thrilled when my clients have a strong relationship with their financial advisor. I feel that a great financial advisor is the quarterback of a client's team of service professionals. Advisors can read an employee benefits package and squeeze out every last dollar, they can help clients plan for the future and mitigate risk, and they are there, year in and year out, as the economic and personal landscape changes.

Here is some information about how De Fonte Law PC delivers Estate Planning With Heart. This newsletter describes the technology and talent we use to ensure a terrific client experience. A one-pager about me is attached here.

Our website also provides a lot of information about the client experience, our team, and our heart forward approach to estate planning.

Any time a client is referred to me by a financial advisor, I respect that relationship and support the advisor by providing them with terrific referrals if they do not have their own in any given area.

Common Issues:

> Casualty insurance: For clients who love to DIY, I encourage them to create a relationship with a local agent or broker. Many clients do not have or understand umbrella insurance, and many of them have not conducted an insurance audit in quite a while.
>
> Life and Disability Insurance: It is common for clients to rely on employee benefits. However, we know that we are all one day away from being older or from being diagnosed. I am a proponent of independent life insurance and disability insurance. Financial advisors are the experts when it comes to determining and balancing the "needs" and "wants" of these types of insurance products.
>
> Family Law Attorney: Many clients do not understand their rights and obligations under California community property laws. Often, a meeting with a family law attorney is needed - especially where the clients have taken title to real estate in a way that does reflect their wishes.

# Creating content for your emails

**Here's an overview of content you can send to the following audiences.**

**Potential Clients:**
Drive new revenue / keep law firm top of mind

- Content:
  - Helpful industry news
  - Guides / webinars
  - Check-ins

**Current Clients:**
Drive repeat revenue / maintain relationship with customer

- Content:
  - Check-ins
  - Important reminders
  - Holiday wishes

**Influencers/ Gatekeepers:**
Increase firm awareness / Expand network

- Content:
  - Referral program
  - Guides / webinars

# Diving into email writing

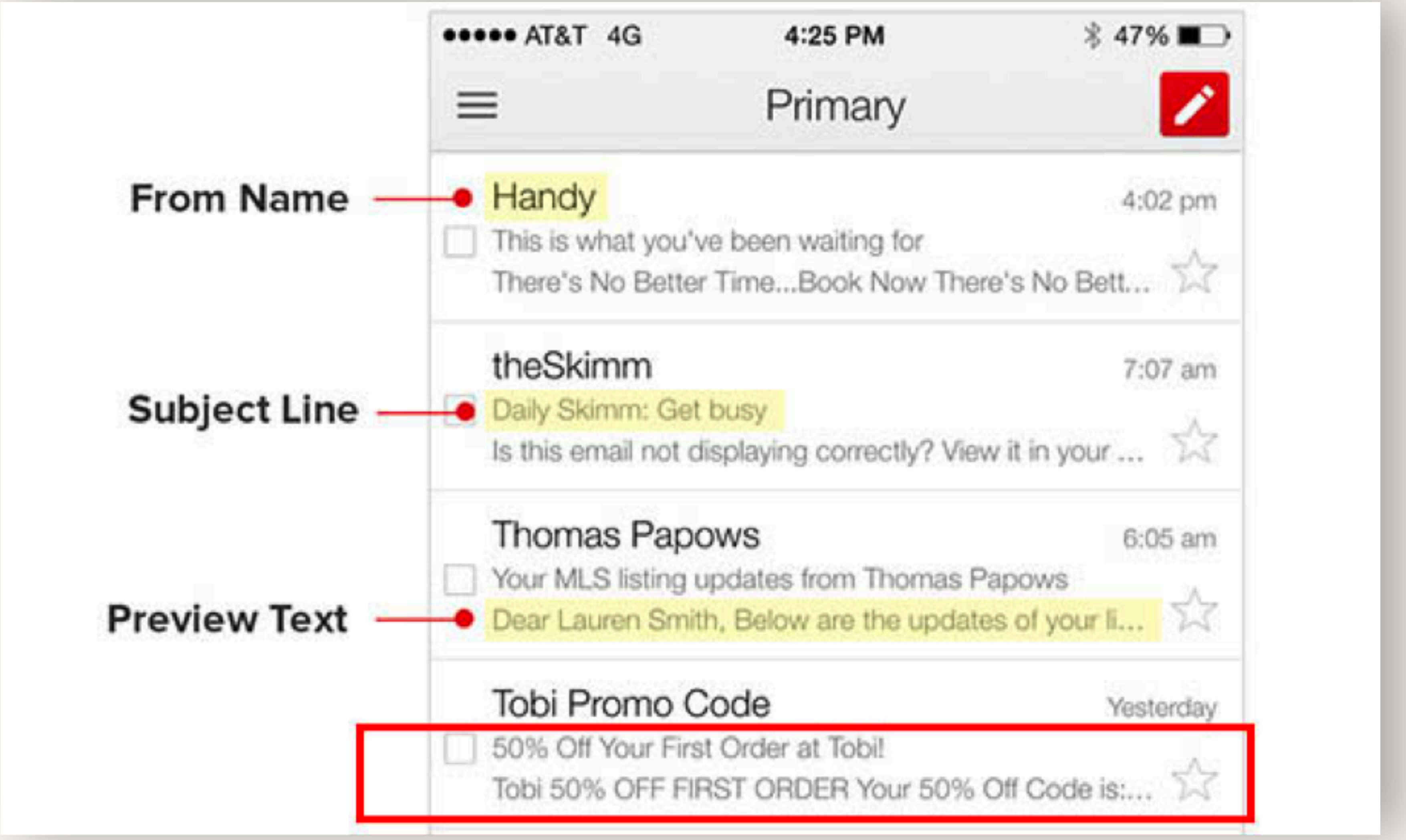
## Copywriting is important.

It's through copywriting you'll be able to provide email recipients with the information necessary to take that next step and become your client.

# Writing Compelling Copy

## Subject line and preview text:

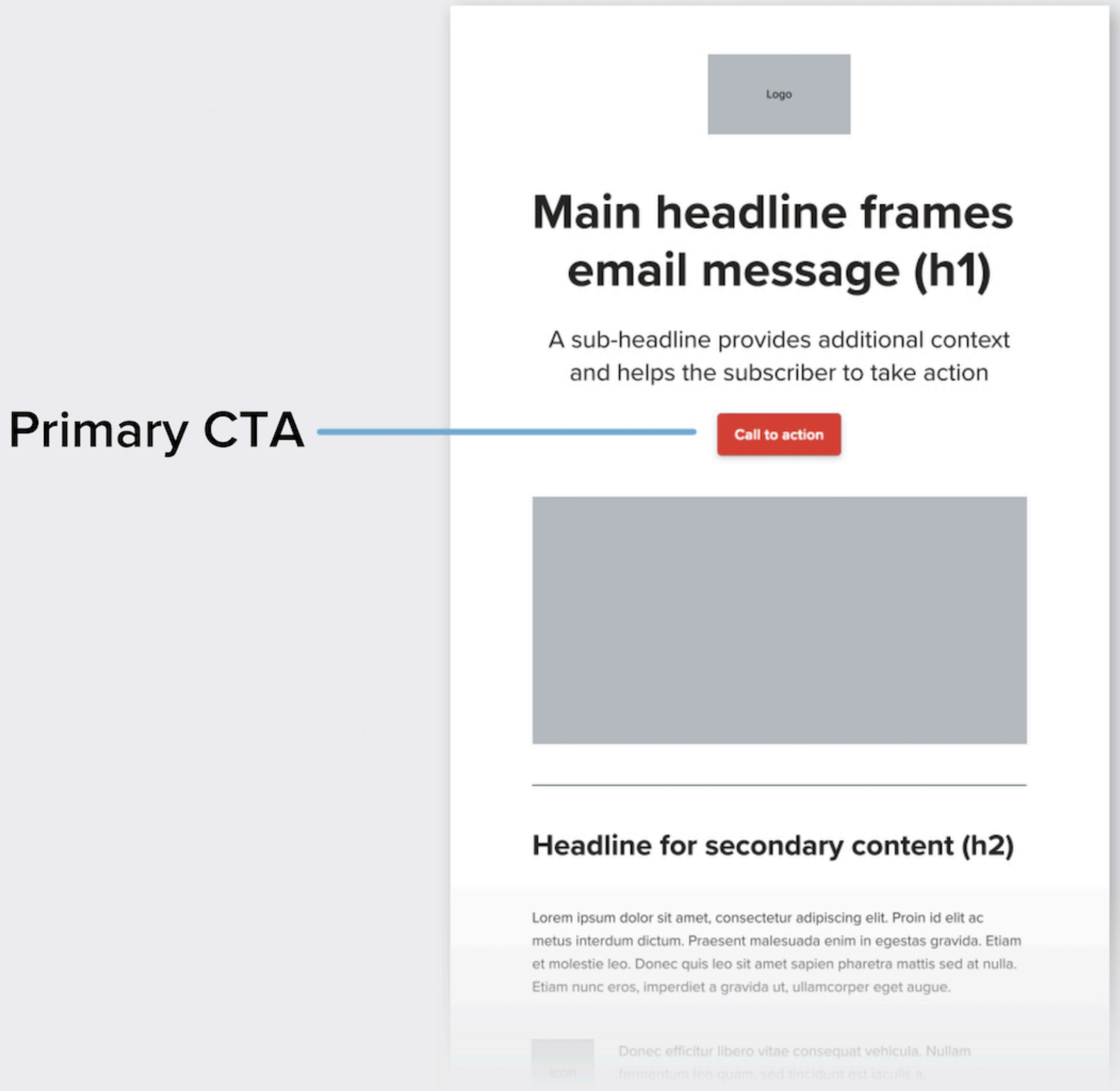
- Subject lines should be sharp, concise, and enticing (no more than 60 characters).
- Utilize A/B testing to identify what works.
- Preview text is the movie trailer for your email—make it electric.



# Writing Compelling Copy

## Call to action (CTA) copy:

- **Keep CTA copy short** and sweet—generally, there should only be one CTA per email.
- The best CTAs contain enticing action words such as: Try, Get, Reserve. They're also deadline driven.



# What if I'm not a writer?

## Not to worry–there are plenty of tools/options for you:

- **Hire a freelancer:** It might be optimal for your firm to **outsource copy**. You will still want to ensure your copywriter uses these best practices.
- **Use writing apps:** tools like Grammarly or Hemingway
- **Use email tools:** like SubjectLine.com

# Timing

When is the optimal delivery time and cadence?

# Cadence / Timelines

**Email Blast:**

- A one-time send (announcements, promotions, etc.)

**Nurture:**

- A series of **triggered** emails that will be sent **based on** engagement with the emails

**Drip:**

- A series of **scheduled** emails that will be sent on a regular cadence, **despite** engagement with the emails

# When should I send this email?

## Tips for determining your send date/time.

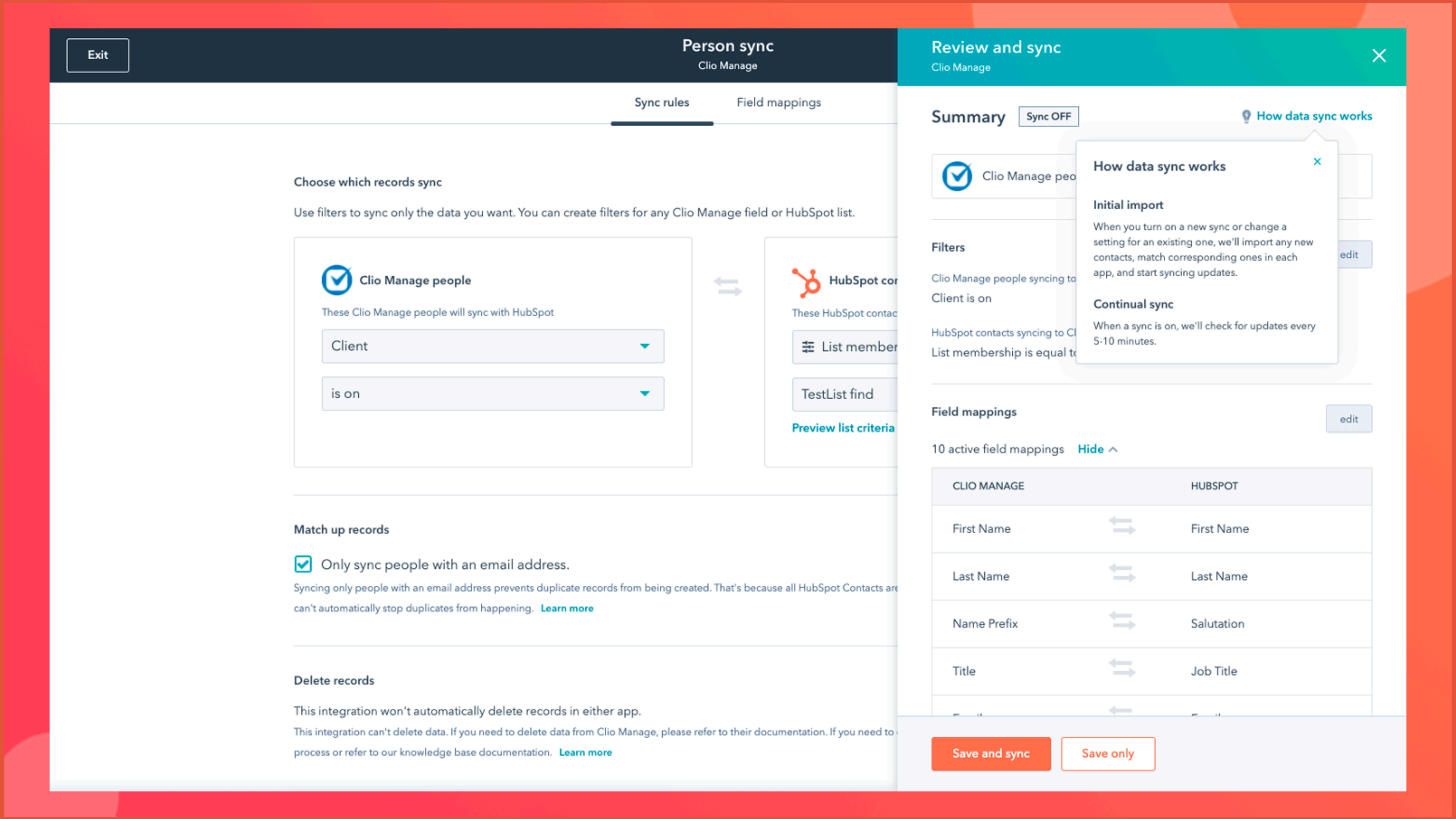
- Weekends vs weekdays
- Morning vs afternoon vs night
- Holidays vs regular work day
- Time zones

# Tools

How to use Clio

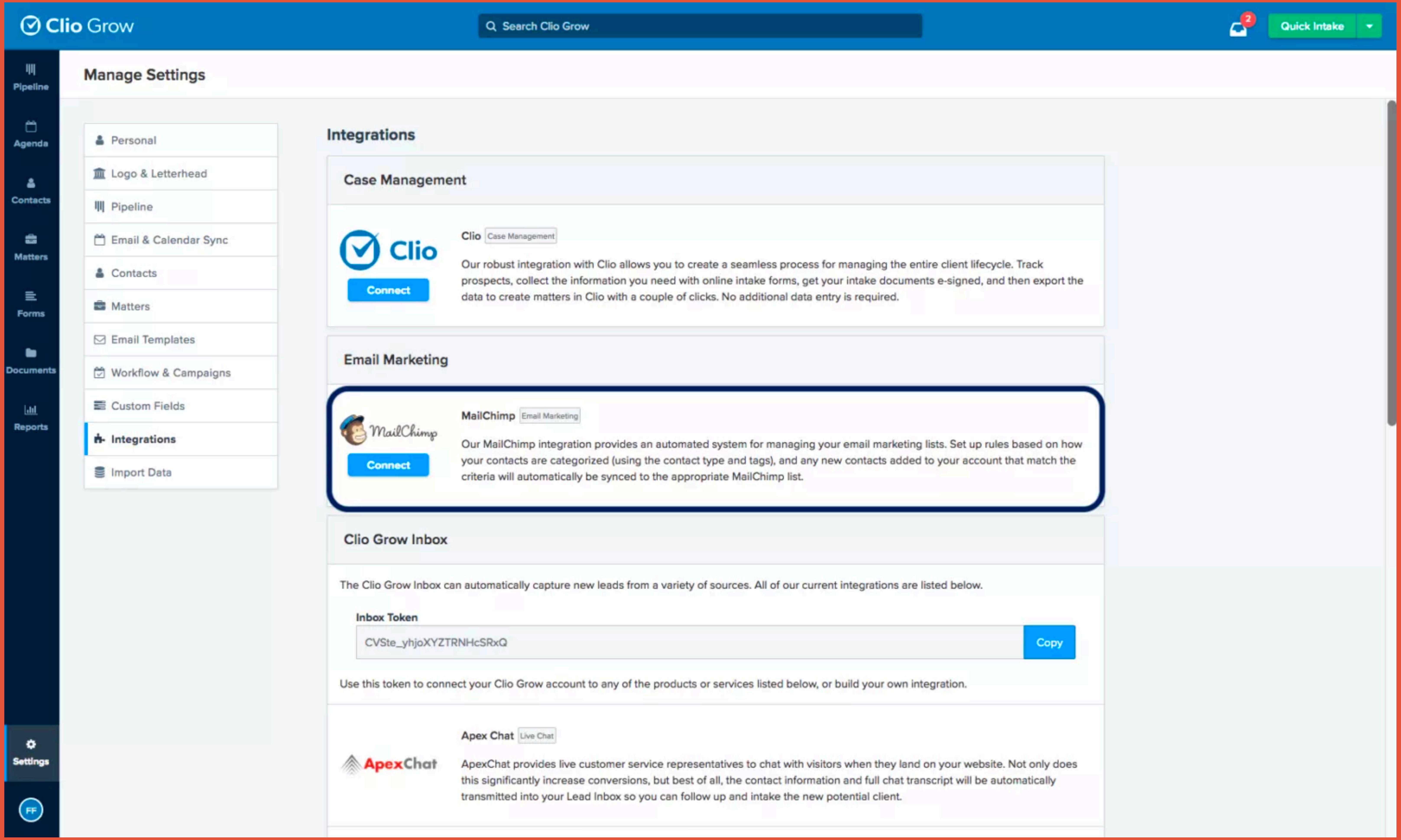
to support email marketing

# Clio Manage



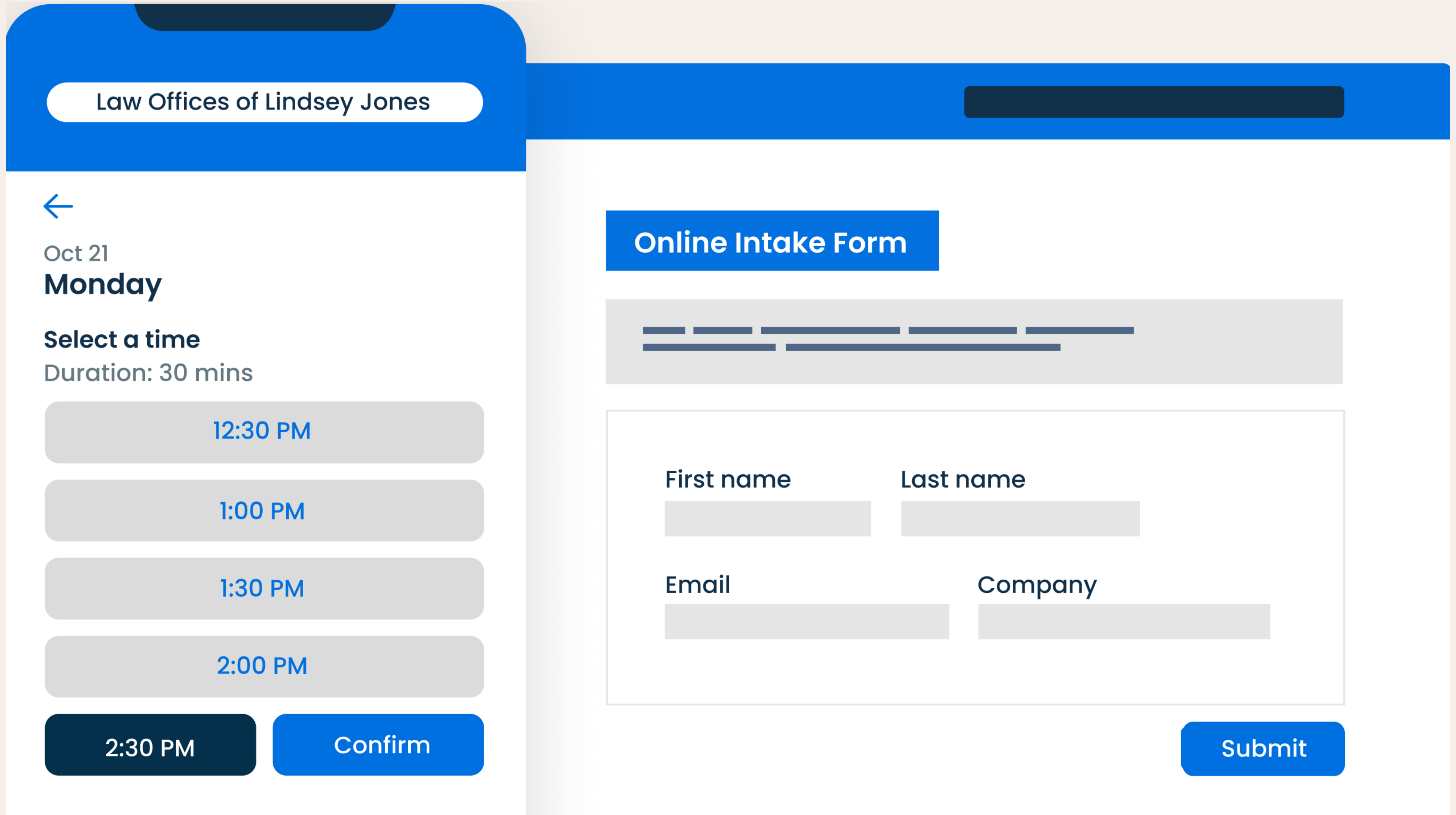
Exit
Person sync
Clio Manage
Sync rules
Field mappings
Choose which records sync
Use filters to sync only the data you want. You can create filters for any Clio Manage field or HubSpot list.
Clio Manage people
These Clio Manage people will sync with HubSpot
Client
is on
HubSpot cor
These HubSpot contac
List member
TestList find
Preview list criteria
Match up records
Only sync people with an email address.
Syncing only people with an email address prevents duplicate records from being created. That's because all HubSpot Contacts are
can't automatically stop duplicates from happening. Learn more
Delete records
This integration won't automatically delete records in either app.
This integration can't delete data. If you need to delete data from Clio Manage, please refer to their documentation. If you need to
process or refer to our knowledge base documentation. Learn more
Review and sync
Clio Manage
Summary
Sync OFF
How data sync works
Clio Manage peo
How data sync works
Initial import
When you turn on a new sync or change a setting for an existing one, we'll import any new contacts, match corresponding ones in each app, and start syncing updates.
Continual sync
When a sync is on, we'll check for updates every 5-10 minutes.
Filters
edit
Clio Manage people syncing to
Client is on
HubSpot contacts syncing to Cl
List membership is equal t
Field mappings
edit
10 active field mappings
Hide
CLIO MANAGE
HUBSPOT
First Name
First Name
Last Name
Last Name
Name Prefix
Salutation
Title
Job Title
Save and sync
Save only

# Clio Grow


Clio Grow
Search Clio Grow
Quick Intake
Pipeline
Agenda
Contacts
Matters
Forms
Documents
Reports
Settings
Manage Settings
Personal
Logo & Letterhead
Pipeline
Email & Calendar Sync
Contacts
Matters
Email Templates
Workflow & Campaigns
Custom Fields
Integrations
Import Data
Integrations
Case Management
Clio
Connect
Clio Case Management
Our robust integration with Clio allows you to create a seamless process for managing the entire client lifecycle. Track prospects, collect the information you need with online intake forms, get your intake documents e-signed, and then export the data to create matters in Clio with a couple of clicks. No additional data entry is required.
Email Marketing
MailChimp
Connect
MailChimp Email Marketing
Our MailChimp integration provides an automated system for managing your email marketing lists. Set up rules based on how your contacts are categorized (using the contact type and tags), and any new contacts added to your account that match the criteria will automatically be synced to the appropriate MailChimp list.
Clio Grow Inbox
The Clio Grow Inbox can automatically capture new leads from a variety of sources. All of our current integrations are listed below.
Inbox Token
CVSte_yhjoXYZTRNHcSRxQ
Copy
Use this token to connect your Clio Grow account to any of the products or services listed below, or build your own integration.
Apex Chat Live Chat
ApexChat
ApexChat provides live customer service representatives to chat with visitors when they land on your website. Not only does this significantly increase conversions, but best of all, the contact information and full chat transcript will be automatically transmitted into your Lead Inbox so you can follow up and intake the new potential client.

# Organize your client intake with Clio® Grow

**Visit the booth in the *Level Up with Clio* area for a demo + learn about our exclusive offer!**



# Audience

- Potential Clients
- Current Clients
- Influencers/gatekeepers

# Content

- Content to achieve your email goals
- Copywriting best practices

# Timing

- Determine what cadence works best for your workflow and audience
- Determine what send time/date works best for your audience

# Tools

- Clio Integrations
- Other Resources

# More Resources

## Take your digital marketing prowess to the next level:

- [Blog] Best Email Marketing Software for Lawyers
- [Blog] 6 Email Marketing Tips for Lawyers
- [Blog] How to Set Up Professional Email for Your Law Firm
- [Webinar] Leverage Emails to Engage Existing and New Clients

# More Tools

## Consider these tools when investing in email marketing at your firm:

- Writing tools: Grammarly, Hemingway, subjectline.com
- Clio Integrations
  - Integrations: MailChimp (for Clio Grow), Hubspot (for Clio Manage)
- [Direct Download] A/B Test Kit - Significance Calculator
- Inspiration: Really Good Emails

Clio Cloud Conference

# Thank You