

Vision Questionnaire

Your Law Firm Success™



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Your Law Firm Success TM

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You and us

- What's your background?
- How did you come to end up working here?
- What are your interests/hobbies away from the office?

Your people

- How many solicitors are in your firm? How many years' experience does each one have? (please note bio information will be sought separately)
- Have any of them been involved in interesting, unusual or noteworthy work? Have any achieved notable successes for their clients?
- What accreditations or memberships do your staff have? (e.g. Law Society specialist accreditation, Rights of Audience, Legal 500 or Chambers listings, advanced degrees, membership of APIL, MASS etc.)
- Do any of your staff have niche practice specialisms or client bases e.g. trade unions.

Your brand

- Please describe your organisation in a few sentences
- Do you have a tagline, slogan or brand statement? If not, please provide a list of your firm's core values
- What problem do you solve for your clients?
- What is your brand voice or personality – how do you communicate? How would you like clients to regard you?
- What is your value proposition? What do you offer that your immediate competitors do not?
- What are the strongest benefits you deliver to clients?
- What are the challenges faced by companies in your sector?
- What are your firm's human personality traits?
- Please provide a brief intro to the firm to serve as an about page (include history, mission statement etc.)

Your clients

- What is your ideal clients background? Please include things like age, gender, professional & educational background
- What are the main type of instruction from this client?
- Is there a tension between what clients want and what they need?
- What are their key expectations from you? (e.g. Communication, speed, efficiency)
- What is their motivation for instructing you? (e.g. necessity, worry for the future)
- What are the most common misapprehensions/assumptions made by this client (e.g. believing the law of another jurisdiction applies)
- Are there any questions which recur from clients of this type? Is there anything you think we could feature on site which would diminish time-wasting or vexatious calls? (e.g. A message advising that you do not do legal aid work)
- How do clients feel after they have worked with you?

Your work

- What are the key areas of work you wish to promote?
- What is the average fee value for each?
- What is your internal conversion rate for enquiries in these areas?
- What percentage of the business is each of these areas?
- Which of these areas are most profitable/desirable?
- Which are least desirable?
- If any of these are contentious, which party do you ordinarily work for (e.g. employer/employee)

Your goals

- Do you have a business plan in place?
- Please define your short, medium & long-term business objectives
- What are your key aims for the project?
- In terms of numbers, what does success look like as far as this project is concerned?
- What are your expectations of working with us?
- What are the main services do you want to promote?

- Have you tried to generate business online before? (If applicable) Yes/No
 - What was the experience like? Good/bad?
 - What's making you change now?
 - What do you wish your previous provider (if you had one) had done differently?
- What offline marketing do you currently engage in? Please outline ALL offline marketing initiatives.

Your location

- Which areas (town, cities, counties, suburbs, regions) do you draw clients from?
- Do you plan to expand geographically in the future?

Your sales

- What is your main source of new business?
- What percentage of enquiries/leads come through your current site?
- What percentage of leads (overall) convert into new instructions?
- How many of these instruct repeat business/remain as clients?
- What is the average lifetime value of a client?
- What are the main barriers to leads converting? Please select as many as appropriate and add others if necessary:
 - Lack of funding/finance
 - Price
 - Lack of actual legal issue
 - Require service you don't offer
- How do you track and manage enquiries which come in through the site?
- How do you track and manage phone calls? How do you attribute these to the source (e.g. website, brochures, telephone directory etc.)?
- How are these enquiries integrated with your current workflow?
- What processes are in place for handling enquiries and ensuring follow up?
- How quickly are leads followed up on?
- What marketing information, if any, do you take from the client? (i.e. 'how did you hear about us' surveys)
- To what extent are calls/enquiries qualified before being passed to a solicitor?

- Have any of your staff ever had formal training in sales/converting enquiries?
- How much time does the average solicitor spend consulting with a potential client before they relationship is formalised?
- How do you internally determine return on investment on your marketing spend?
- What remarketing activities do you employ? Please select as many as appropriate and add others if necessary:
 - Email marketing
 - Regular phone calls
 - Leafletting/flyers
 - Asking for referrals

Your resources

- Do you have in-house or contracted designers, web developers or IT specialists? Are you working with a PR agency?
- Who will be our main point of contact for the day-to-day running of the account? What is their background?
- Who is/are the main decision makers with respect to the account? How much time will they set aside to focus on your account?
- Do you have any offline material which may be relevant e.g. whitepapers, handouts, flyers, pamphlets, styles or guides stored on intranet systems etc.
- Are you involved in any pro bono or charity work?

Your competitors

- Who are your main local, similarly-sized competitors?
- Initial Competitor Analysis [MLT to complete]: -
 - Competitor 1 [MLT to complete]: -
 - Domain age:
 - Domain Authority (a measure of their domain's strength): /100
 - Number of Words of Content:
 - Other comments:
 - Competitor 2 [MLT to complete]: -
 - Domain age:
 - Domain Authority (a measure of their domain's strength): /100
 - Number of Words of Content:
 - Other comments:
 - Your domain now [MLT to complete]: -
 - Domain age:
 - Domain Authority (a measure of their domain's strength): /100
 - Number of Words of Content:
 - Other comments:
- Which firms' online presence impresses you the most in your sector or among your competitors?

Your online presence

- Do you control your domain? If so, please provide login information to your current host
- Do you have Google Analytics enabled? If so, please provide login information or grant us full admin access using the email address stephen.moore@casecheck.co.uk
- Please provide login information for:
 - Your firm's social media accounts
 - The backend/administration section of the current site
 - Access to any other relevant accounts

Your project

We will fill in this bit so take 5 minutes to check your answers, then have a well-earned cup of tea!

Your key performance indicators

- Based on the above, these are the agreed KPIs for your project [MLT to list]:

Your webpages

- Based on the above and terms of your package, we will write the following pages for you [MLT to list]:

Your keywords

- As per your package, we will track the following keywords for you [MLT to list]: