

VISION QUESTIONNAIRE



Part of Peloton Communications



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@Moore_Legal



moore-legal-technology

YOUR LAW FIRM SUCCESS STARTS HERE

Welcome to Your Law Firm Success™ - A comprehensive package of digital, marketing, sales, branding & strategic services to help modern law firms grow.

The questions, answers, insights and inspiration in this document will shape your firm's growth. So, take your time, reflect, answer honestly and get ready for the future.

To help you, please see this example anonymised, completed questionnaire: [Link](#)

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YOUR BRAND

YOUR BRAND IS WHAT YOUR CLIENTS SAY IT IS. SO, LET'S PUT OUR WORDS IN THEIR MOUTHS.

Why are we asking this? Your brand is more than your logo. It's your firm's culture. It's what you say and how you say it. It's your firm's history and it's your firm's future. It's how you work and who you work with.

1. What is the story behind your current brand?

2. What is your value proposition/USP? Why should your target audience choose your product or service above your competitors?

3. What (if anything) do you like/dislike about your current brand identity and online presence?

4. What are the particular adjectives or traits you want people to associate with your brand?

5. Can you name a few examples of law firm brands you admire or aspire to be like?

6. Please list 3 legal Sector and 3 non-legal sector websites you like, and tell us what you like about them:

YOUR WORK

THIS ISN'T ABOUT WHAT YOU DO, IT'S ABOUT WHAT YOU WANT TO DO MORE OF. BY UNDERSTANDING YOUR WORK, WE CAN HELP YOU GET MORE OF IT.

1. What are the key practice areas and services you wish to promote?

2. What geographical locations do you want to target for each practice area/service?

3. What is your internal conversion rate for enquiries in these areas?

4. What percentage of your business comes from each of these areas?

5. Which of these areas are most profitable/desirable?

6. Which areas are least desirable?

YOUR CLIENTS

NO ONE CAN BE ALL THINGS TO ALL PEOPLE. DEFINING YOUR IDEAL CLIENT PERSONA HELPS US TO TARGET THE RIGHT DEMOGRAPHIC FOR YOU.

Why are we asking this? We want to make sure we're bringing in valuable business, and business of the right type. Again, the design and content will differ depending on the target market. A business owner has different needs and expectations in terms of design, layout and depth & quality of information compared to a family law client, for example.

This information helps us produce content and design that speaks directly to the client. We want to acknowledge their needs, assuage their concerns and demonstrate that you are exactly the right firm for them. Using the information below, we'll make sure your website speaks your clients' language.

1. Who are your ideal clients?

2. What are the main types of instruction from these clients?

3. What other legal needs might they have?

4. What do these clients value?

5. What are these clients' fears?

6. What are the main factors in their decision-making processes?

YOUR GOALS

WHAT DO YOU WANT TO ACHIEVE? THIS GOES DEEPER THAN “GET MORE CLIENTS” OR “MAKE MORE MONEY”. THIS IS ABOUT THE FUTURE OF YOUR FIRM AND THE FUTURE OF YOUR CAREER.

1. Do you have a business plan in place? What are the main goals?

2. Where do you see the firm in 10 years?

3. Please define your short, medium & long-term business objectives:

4. What are your key aims for the project?

5. In terms of numbers (enquiries, files opened or revenue), what does success look like as far as this project is concerned?

6. What are your expectations of working with us?

YOUR SALES

What gets measured gets managed. Our business is built on generating leads for you. As such, it's vital we get feedback on the quality of the leads, the sources of the leads and how you are converting them. It's also important that you can accurately determine the return on your investment with us.

- 1.** Do you have a system in place to track enquiries? If so, who is responsible for overseeing it? What is your reporting process?

- 2.** What percentage of enquiries/leads come through your current site?

- 3.** What percentage of leads (overall) convert into new instructions?

- 4.** What is your upsell/cross-sell process?

- 5.** What are the main reasons people don't instruct you?

6. How do you track and manage phone calls? How do you attribute these to the source (e.g. website, brochures, telephone directory etc.)?

7. What processes are in place for handling enquiries and ensuring follow up?

8. How quickly are leads followed up on? Is there a process in place?

9. What marketing information, if any, do you take from the client? (i.e. 'how did you hear about us' surveys)

10. To what extent are calls/enquiries qualified before being passed to a solicitor?

11. Have any of your staff ever had formal training in sales/converting enquiries?

12. How do you test your team's enquiry handling processes? Mystery shopping, test calls?

13. How do you internally determine Return on Investment on your marketing spend?

14. What remarketing activities do you employ? E.g. email marketing, leafleting, flyers, referrals etc.

YOUR RESOURCES

EACH OF OUR CLIENTS IS DIFFERENT AND HAS DIFFERENT NEEDS AND EXPECTATIONS. BY UNDERSTANDING YOUR INTERNAL RESOURCE, WE CAN MORE EFFECTIVELY WORK TOGETHER.

- 1.** Who will be our main point of contact?
Please provide name, email address and direct dial

- 2.** Do you have any offline material which may be relevant e.g. whitepapers, handouts, flyers, pamphlets, styles or guides stored on Intranet systems etc.

- 3.** What is your internal approval process? Who is responsible for signing off on design & content?
Please provide name, email address and direct dial

- 4.** What is your expected timeline for this project? Are there any dates we need to be aware of?

YOUR COMPETITORS

COMPETITION IS A GOOD THING **(IF YOU WIN)**. LET'S SEE WHO WE ARE GOING UP AGAINST.

Who are your main local, similarly-sized competitors?

LOGINS

BEFORE WE GET STARTED, IN ORDER FOR US TO GENERATE BUSINESS ONLINE FOR YOU, WE NEED TO HAVE ACCESS TO ALL RELEVANT LOGINS.

It may be best forwarding this to your firm's IT contact and/or person who has current managerial access for your site and social media channels.

- 1.** Your website(s) logins (for the Content Management System ('CMS') e.g. for Joomla!, Wordpress etc)

- 2.** Your domain name logins (for the domain name provider you registered your domain name with e.g. 123-reg, BT, GoDaddy etc)

- 3.** Your hosting / server / database logins (e.g. cPanel)

- 4.** Your FTP logins

- 5.** Your Google My Business logins (note that if you don't have these logins, we can acquire access through other options, which will involve a call, email or postcard from Google)

6. Your Twitter logins

7. Your Facebook page logins (please add david@moorelegaltechnology.co.uk as an admin – note this will appear as ‘Dave Kerr’ in the dropdown list of options. Instructions are available here:- <https://www.facebook.com/help/187316341316631/>)

8. Your LinkedIn ‘Company Page’ logins (please add our Gavin Ward as an admin. Instructions are available here:- <https://www.linkedin.com/help/linkedin/answer/37594/adding-or-removing-admins-on-your-company-page?>)

9. Any other relevant logins for other online channels

HELPING MODERN LAWYERS THRIVE

For further information please contact

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