



Marketing Audit

Firm Name: _____

Web Address: _____

Firm Contact: _____

Phone: _____

General Firm Information

1. How many attorneys does the firm currently employ? _____

2. How many office locations does the firm currently have? List locations.

3. Is this a full-service firm or does it focus on a particular practice area(s)?
(Please list specific practice areas to be promoted)

4. What types of clients does the firm typically attract? (This may vary by practice group).

Strategic Input

5. Does your firm currently have a marketing plan? Yes No

6. Has the firm established a marketing budget? If so, what is the range of this allocation? _____

7. How would you describe the firm's corporate culture, reputation, and image?

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8. Is there a specific objective the firm is seeking to accomplish (e.g., establish a brand, compete with larger firms, open a new office, venture into a new legal practice area, etc.)? Please describe in as much detail as possible.

9. Is the goal to market the overall firm, specific practice areas, individual attorneys, or some combination thereof?

10. Who do you consider the firm's target market to be? (List all, including referral source targets).

11. What is the firm's geographical service area?

12. How would you describe what sets the firm apart from its competition (e.g., unique offerings, experiences, industry expertise, qualifications)?
What tangible benefit(s) does the firm provide?

13. What hurdles exist to meeting the stated objectives? What is the firm's biggest challenge?

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Competitive Overview

14. What is the nature of both the geographical market and the practice areas in which the firm competes? How large is the potential opportunity? What is the "typical" process by which law firms in this industry attract/solicit/pursue new clients?

15. How do the firm's fees compare with competitive practices?

16. How do changes in overall economic conditions affect the industry?

Marketing & Business Development

17. What kinds of marketing activities (e.g., on-line, collateral materials, advertising, public relations, seminars, etc.) is the firm currently implementing and what types of activities has it implemented in the past? How successful have they been?

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Miscellaneous

18. What kinds of business development strategies/tactics/activities has the firm implemented in regard to business development (e.g., these may be in regard to client retention, cross-promotion, attorney coaching, prospecting, customer service, client satisfaction, etc.)?

19. Is there any other information you can provide that might help us to help you?
