

Tips to Getting the Greenlight on Your Marketing Initiatives



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When my sister was the assistant rabbi at a popular Brooklyn temple, she shared a little secret with me: that she didn't only report to the senior rabbi. No, she had 1,500 bosses — all the temple's members! Most of whom felt they were entitled to share their opinions with her about just about everything. This sharing occurred regularly — in the temple's hallways, just before services, on her voicemail, and even when members ran into her riding the subway or shopping at Costco.

How does this relate to getting the greenlight on *your* marketing initiatives?

Having worked on both sides of the desk (in-house at two large law firms and as an outside consultant), I know the difficulties marketers face when seeking approvals. Like my sister's experience, it's a given that the boss — or many bosses — will have a say in how and where money is spent. That means marketers are bound to hear from nearly every attorney seated at the table when presenting a new marketing initiative for the firm. Attorneys will want to fully understand what they're being asked to consider before offering their approval. Don't despair. There are ways to help make the clock run faster and make things happen.

Here are some essential steps to take when seeking the greenlight for your marketing initiative.

Do you know who is “The Decider?”

Is there one decision-maker or is it a committee? Maybe it's two committees. Find out fast. If you're a service provider, you'll want to know the answer *before* you submit your proposal. Not knowing this answer can cause serious damage to your profit margins, because dealing with multiple committee members adds time to the process.

Gauge the required level of detail for the audience

Do your attorneys need to know every little detail — or will an executive summary work better with this group? If you are unsure about their preference, speak to an assistant who works closely with these folks.

Choose your cheerleaders carefully

If your firm chair is a fabulous cheerleader but promotes every firm initiative with the same enthusiasm, you might want to find someone else. As [Bethany \(Early\) Chieffallo](#), Jaffe Vice President of Public Relations, recommends, “Find a champion in the firm — a lawyer who already does or who would support your initiative, and who is well known, well respected and well spoken, so he or she can help to champion your initiative and to bring others on board for change.”

Pick the right group to pilot your program

Make it known that the initiative first will be launched as a pilot and define the pilot group. Firms seem to be more comfortable when new things are rolled out slowly rather than to everyone all at once. When selecting your group, avoid the one that is naturally inclined to respond positively, or you may not gain enough critical feedback, which could lead to uncovering new issues when the program is rolled out firmwide. To learn more, check out “**How to Pilot New Legal Marketing Initiatives**” by Jaffe Senior Vice President, Business Development and Marketing, [Joi Neike](#).

Identify trusted vendors to work with

No one, especially attorneys, wants to be taken advantage of, so be sure to thoroughly vet the capabilities and qualifications of outside resources that will help with your initiative. Come to the presentation prepared with their proposals in hand, in case you need to provide more details.

Highlight the benefits in relatable terms

Show how the benefits will go straight to the bottom line. If you can illustrate ways that your service/program/software will require the least time from the most-expensive timekeepers with the least amount of friction (read: not eating into their billable hours), there's a greenlight in your future. Jaffe's Senior Vice President of Public Relations [Michelle McCormick](#) adds, “It's important to identify how you are going to measure success and how you'll articulate it. Success will look different for

different campaigns and with different goals in mind.”

Paint a picture

Whenever possible, use a visual format and present your research or background information in digestible chunks to support your initiative. For instance, data visualizations will help decision-makers see the big picture in a compact way. Jaffe’s Director of Digital Strategies [Melanie Trudeau](#) uses Google Data Studio workshops to bring clarity to shared information. When the boss summons, you’ll have something right at your fingertips that provides a snapshot for the decision-maker.

Newsflash: Your clients want what you’re recommending

It’s hard to argue with the program if you include industry-driven data. [Susan Freeman](#), CEO & Chief Client Happiness Officer at Freeman Means Business, believes it becomes even more bulletproof when you have client-driven data points and examples as your rationale. This is when client interview information can help get you the buy-in for a program that you believe will benefit clients and the firm. What’s not to like?

Green means “Go!”

My final suggestion comes from the CMO at my first law firm, which I still use to this day. She advised me to “think about the half-dozen questions you’re likely to be asked — and be ready with the answers.”

Whether you’re seeking approval from five, 15 or 1,500 bosses, using these steps to develop strong insights and knowing what is most important to the right group should make that light turn green and your new initiative a go.

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