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The 2027 Law Firm Marketing Plan Workbook

A fillable workbook for building your firm's 2027 marketing plan, from case value math and client personas to intake targets, channels and budget. Work through one section at a time and finish with a plan your team can run and measure every week.

PREPARED FOR

PLAN PERIOD

QUICK START

How to use this workbook

This workbook is the working companion to our law firm marketing plan guide at trymaas.com/blog. Read the guide once for context, then fill in one section per week. Every box in this PDF is a form field: type straight into it in Acrobat, Preview or your browser, then save.

THE THIRTEEN SECTIONS

1. Business snapshot
2. SWOT analysis
3. Customer personas
4. Competitive analysis
5. Brand positioning
6. Goals and KPIs
7. Customer journey map
8. Channel strategy
9. Content strategy and calendar
10. Budget, stack and measurement
11. 12-month plan
12. Common mistakes
13. Quick start

> **Time budget.** Most sections take 30 to 60 minutes. Do them in order: positioning (section 5) only holds up once the snapshot, SWOT, personas and competitor work are done.

NEED HELP?

If you would rather have a team build and run this plan with you, MaaS by CodeSM is an outsourced marketing team for consumer-facing law firms in personal injury, family, criminal defense, immigration and estate planning. Book a call at **trymaas.com/get-a-demo**.

SECTION 1 · WHERE YOU ARE TODAY

Business snapshot

One page that anyone on your team, or any partner you hire, can read in two minutes.

BUSINESS NAME

LOCATIONS / SERVICE AREA

CORE SERVICES OR PRODUCTS

AVERAGE SALE OR CUSTOMER VALUE

TOP THREE CURRENT SOURCES OF CUSTOMERS

REVENUE GOAL FOR THE YEAR

CURRENT MONTHLY MARKETING BUDGET

WHO OWNS MARKETING TODAY

WHAT MAKES CUSTOMERS CHOOSE US OVER THE ALTERNATIVES?

WHAT HAS WORKED IN MARKETING SO FAR, AND WHAT HASN'T?

SECTION 2 · HONEST INTERNAL AUDIT

SWOT analysis

Strengths and weaknesses are about you. Opportunities and threats are about your market. Every weakness is a message you should not lead with; every opportunity is a campaign you haven't run yet.

STRENGTHS

What do clients, referral sources and opposing counsel say you do better than other firms? Think trial record, bilingual attorneys, fast intake, clear flat fees, a known name partner, reviews.

WEAKNESSES

Where do you lose cases? Missed calls, no after-hours answering, thin or old reviews, one referral source carrying the firm, a dated website, no Spanish-language intake.

OPPORTUNITIES

Which practice areas, counties or languages are underserved in your market? Are Local Services Ads open in your categories? Do AI assistants name anyone yet when asked for a lawyer in your city?

THREATS

National advertisers with TV budgets, lead-generation sites reselling your clients, rising cost per click, state bar rule changes, a key attorney or referral source leaving.

TOP TAKEAWAYS

THE TWO STRENGTHS WE WILL LEAN ON HARDEST IN OUR MARKETING

THE ONE WEAKNESS TO FIX BEFORE WE SCALE SPEND

SECTION 3 · CUSTOMER PERSONAS · PERSONA 1

The Urgent Caller

Just arrested, injured or served, and hiring today.

Searches on a phone within hours of the event, calls two or three firms and hires the first one that answers and explains the next step. Criminal defense, DUI and personal injury clients usually start here.

CASE TYPE

TRIGGER EVENT

TIME TO DECISION

LANGUAGE PREFERENCE

FIRST QUESTION THEY ASK

CHANNEL THEY USE FIRST

WHAT HAPPENS IF THIS CALLER REACHES VOICEMAIL AT 7 P.M. ON A FRIDAY?

WHAT CAN INTAKE SAY IN THE FIRST TWO MINUTES THAT PROVES WE CAN HELP?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 2

The Careful Researcher

Weeks or months of reading before a consultation.

Facing a divorce, an immigration petition or a parent's estate, they read, compare fees, watch videos, ask friends and ask AI assistants before booking. Family law, immigration and estate planning clients usually start here.

CASE TYPE

RESEARCH WINDOW

SOURCES THEY TRUST

FEE CONCERNS

PROOF THEY NEED

CONTENT THAT MOVES THEM

WHICH THREE QUESTIONS DOES THIS PERSON ASK IN EVERY CONSULTATION, AND DO WE ANSWER THEM ON OUR SITE?

WHAT FOLLOW-UP KEEPS US ON THEIR SHORTLIST WHILE THEY DECIDE?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 3

The Referred Client

Sent by someone they trust and already half decided.

Comes from another attorney, a past client, a CPA, a financial advisor or a community group, then checks reviews and the website to confirm the recommendation. Expects a fast, warm first call.

REFERRAL SOURCE

RELATIONSHIP TO SOURCE

CASE TYPE

WHAT THE SOURCE TOLD THEM

EXPECTED RESPONSE TIME

HOW WE THANK THE SOURCE

WHICH 20 REFERRAL SOURCES SENT US CASES IN THE LAST 12 MONTHS, AND WHEN DID WE LAST TALK TO EACH?

DOES OUR WEBSITE MATCH WHAT OUR REFERRAL SOURCES SAY ABOUT US?

SECTION 4 · KNOW THE FIELD

Competitive analysis

List the four or five businesses your customers compare you with, including the ones that aren't really competitors but win the same budget. Fill in what you can see from the outside.

BUSINESS	PRACTICE AREAS PROMOTED	GOOGLE RATING AND REVIEW COUNT	LOCAL SERVICES ADS AND GOOGLE ADS PRESENCE	SPANISH-LANGUAGE PAGES AND INTAKE	AFTER-HOURS RESPONSE (TEST CALL)	FEE TRANSPARENCY AND CONTENT DEPTH
Us						
Competitor 1						
Competitor 2						
Competitor 3						
Competitor 4						
Competitor 5						

WHERE WE CLEARLY WIN

WHERE WE LOSE TODAY, AND WHY

SECTION 5 · ONE SENTENCE THAT DECIDES EVERYTHING

Brand positioning

Positioning is the reason a customer should pick you. Write it before you write a single ad.

For [who you serve] who [need or problem], [your business] is the [category] that [main benefit]. Unlike [main alternative], we [proof].

WORKED EXAMPLE

> *For working families in Hidalgo County facing a removal hearing or a family petition, Rivera & Ochoa is the bilingual immigration firm that answers in Spanish or English within 15 minutes, seven days a week, because every intake specialist on our team is bilingual and an attorney reviews every new case within one business day.*

OUR POSITIONING STATEMENT

PROOF POINT 1

PROOF POINT 2

PROOF POINT 3

SHORT VERSION FOR THE WEBSITE HEADLINE

SECTION 6 · WHAT WINNING LOOKS LIKE

Goals and KPIs

Three to five SMART goals: specific, measurable, achievable, relevant, time-bound.

#	GOAL	CURRENT	TARGET	BY WHEN / OWNER
1				
2				
3				
4				
5				

Examples. Grow signed personal injury cases from marketing from 8 to 12 per month by Q4 2027 while holding cost per signed case under $1,500. Answer 90% of intake calls live during business hours and return every missed call or form within 15 minutes by March 31. Raise the family law consultation-to-retainer rate from 35% to 45% by June 30. Reach 150 Google reviews averaging 4.7 or higher across both offices by December 31.

MONTHLY KPI CHECK-IN

METRIC	WEEK 1	WEEK 2	WEEK 3	WEEK 4	GOAL
Leads by practice area and source					
Live answer rate on intake calls					
Time to first contact					
Consultations booked and show rate					
Retainers signed					
Cost per signed case					

SECTION 7 · FROM FIRST SEARCH TO REPEAT CUSTOMER

Customer journey map

Where your customer is, what they are doing, and where you meet them. Fill in the last column with what you will do at each stage.

STAGE	WHAT THE CUSTOMER DOES	WHERE WE MEET THEM	OUR ACTION
Trigger event	An arrest, accident, separation, visa deadline or death in the family creates a legal problem, often with stress and urgency.	Not yet in contact; brand awareness from past ads, community presence or referral sources	
Search or ask	Searches the problem plus their city, asks an AI assistant, or asks a friend or another lawyer.	Google Search, Local Services Ads, map pack, ChatGPT and AI answers, referral sources	
Shortlist	Compares two to four firms on reviews, language, clarity and fees.	Google Business Profile, reviews, practice-area landing pages	
First contact	Calls, fills out a form, chats or texts and waits to see who answers first.	Phone answered live, web form, chat, text, after-hours answering	
Intake screening	Explains the situation and wants to know if the firm can help and what it costs.	Intake specialist, conflict check, qualifying script, CRM	
Consultation	Meets an attorney and decides whether this is the right firm.	Office, phone or video consultation, follow-up email	
Engagement	Reviews the fee agreement and signs, or keeps shopping.	E-signature retainer, payment options, onboarding message	
Case work	Wants regular updates, a named contact and no fee surprises.	Client portal, status emails or texts, scheduled calls	
Resolution	Relieved or disappointed, and ready to judge the experience.	Closing letter, review request	
Referral	Recommends the firm to friends and family, or does not.	Past-client email, social media, referral thank-you within bar rules	

SECTION 8 · WHERE THE BUDGET GOES

Channel strategy

Tick the channels you will run this year and name an owner for each. Investment ranges are planning ranges; adjust to your market.

USE	CHANNEL	ROLE	CADENCE	TYPICAL INVESTMENT	OWNER
☐	**Google Business Profile (each office)**	Map pack visibility, reviews and calls	Weekly posts, monthly photos	Free plus 1 hour per week	
☐	**Google Local Services Ads**	Pay-per-lead placement for core case types	Always on, weekly lead review and disputes	$1,000 to $5,000 per month	
☐	**Google Search Ads**	High-intent capture by practice area and city	Always on, weekly search term review	$2,000 to $15,000 per month	
☐	**Practice-area pages and SEO**	Rank for case type plus city in English and Spanish	2 to 4 pages or articles per month	$1,500 to $5,000 per month	
☐	**Review program**	Steady, recent reviews that lift every other channel	Ask at every case resolution	$50 to $300 per month	
☐	**Referral network**	High-trust cases from attorneys, CPAs, advisors and community groups	Monthly touchpoints, quarterly lunches or events	Time plus events	
☐	**Meta Ads**	Retargeting, seminars and awareness for family and estate planning	Always on or seasonal	$500 to $3,000 per month	
☐	**Short video (YouTube, Reels)**	Attorneys answering real client questions	2 to 4 videos per month	Time plus light production	
☐	**Email and SMS nurture**	Follow-up for researchers and past clients	Monthly newsletter plus triggered sequences	$50 to $300 per month for tools	
☐	**Directories and lawyer referral services**	Citations, credibility and referral service leads	Quarterly audit	Varies by service	
☐	**Call tracking and CRM**	Attribution and intake follow-up	Always on	$100 to $500 per month	

SECTION 9 · CONTENT AND SOCIAL

Content framework

Practice-area pages first, then answers to the questions clients ask in every consultation, then short attorney videos. Plan 2 to 4 pages or articles and 2 to 4 short videos per month, 3 social posts per week and one email to past clients each month, in every language you serve.

EIGHT CONTENT CATEGORIES TO ROTATE

CATEGORY	FORMAT	FREQUENCY	EXAMPLE
1. Practice-area pages	Landing page	1 to 2 per month until each case type and city is covered	DUI defense in Bexar County: what happens in the first 72 hours
2. What happens next explainers	Article plus carousel	2 per month	You were just served divorce papers. Here are your next five steps.
3. Attorney Q&A video	60 to 90 second captioned video	2 to 4 per month	Can I be deported for a traffic ticket? An immigration attorney answers.
4. Local process guides	Article or downloadable checklist	1 per month	Where to go and what to bring for your first hearing at the county courthouse
5. Fees and process	Page plus short video	Quarterly update	How a contingency fee works, and what it does not cover
6. Law changes	Article plus email	As laws change, at least quarterly	New state laws taking effect January 1 that affect your estate plan
7. Client stories	Written story or video with consent	1 per month	How a family kept their home after a probate dispute, shared with permission
8. Team and community	Photo post or short video	Weekly	Meet the bilingual intake team that answers your call

OUR THREE CONTENT PILLARS THIS YEAR

SECTION 9 · CONTENT AND SOCIAL

30-day content calendar

Plan one month ahead. Write the post idea and the channel in each day you publish.

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18
19	20	21	22	23	24
25	26	27	28	29	30

SECTION 10 · BUDGET ALLOCATION

Budget allocation

A starting split for a typical business in this industry. Write your own percentages and monthly dollars next to it.

TOTAL MONTHLY MARKETING BUDGET (AD SPEND + PEOPLE + TOOLS)

BUCKET	EXAMPLE	WHY	OUR %	MONTHLY $
Google Search Ads	35%	Top two or three practice areas, tight negative keywords		
Local Services Ads	15%	Core case types, dispute invalid leads weekly		
SEO and content (English and Spanish)	20%	Practice-area pages, FAQs, attorney video		
Reviews, intake and call tracking tools	10%	Review requests, answering service, call recording		
Meta Ads and video	10%	Retargeting, seminars, awareness		
Referral and community programs	5%	Referral source events, sponsorships, within bar rules		
Testing reserve	5%	New practice area, new language or new channel tests		

WHAT WE WILL CUT FIRST IF RESULTS LAG, AND WHAT WE WILL ADD FIRST IF THEY BEAT TARGET

SECTION 10 · TOOLS AND MEASUREMENT

Tech stack and weekly dashboard

STACK CHECKLIST

- [ ] Google Business Profile claimed and complete for every office
- [ ] Apple Business Connect and Bing Places listings
- [ ] Case management or legal CRM with a required lead source field
- [ ] Call tracking with recorded calls and dynamic numbers
- [ ] Live answering or on-call intake for after-hours calls
- [ ] GA4 with conversion events for calls, forms and chats
- [ ] Google Ads and Local Services Ads accounts with conversion tracking
- [ ] Review request tool tied to case resolution
- [ ] Practice-area landing pages in each language you serve
- [ ] Email and SMS platform with consent capture on every form
- [ ] State bar advertising rules checklist and filing calendar
- [ ] Weekly dashboard shared with partners

WEEKLY MEASUREMENT DASHBOARD

METRIC	THIS WEEK	LAST WEEK	GOAL	STATUS
Leads by practice area				
Leads by source				
Live answer rate				
Time to first contact				
Consultations booked				
Retainers signed				
Cost per signed case				
New Google reviews and average rating				

SECTION 11 · THE YEAR AT A GLANCE

12-month action plan

The order we suggest. Move rows to fit your season, add an owner, and tick each one off.

WHEN	FOCUS	OWNER	DONE
Month 1	Snapshot, personas, positioning and cost per signed case targets; claim and complete every listing		☐
Month 2	Intake audit, call tracking, lead source field, 15-minute response standard		☐
Month 3	Landing pages for the top two case types, compliance review, Local Services Ads and Search Ads launch		☐
Month 4	Weekly dashboard live, review program running, first referral source outreach		☐
Month 5	Spanish-language pages and ads for priority case types		☐
Month 6	Mid-year review of cost per signed case by channel, reallocate budget		☐
Month 7	Content program at full cadence, attorney video series		☐
Month 8	Nurture sequences for researchers and past clients		☐
Month 9	Meta retargeting and seminar campaigns for family and estate planning		☐
Month 10	Referral source events and thank-you program within bar rules		☐
Month 11	Check new state rules and laws taking effect January 1, update pages		☐
Month 12	Annual review of signed cases and fees by source, set next year's plan		☐

SECTION 12 · WHAT TO AVOID

Common mistakes

The patterns we see most often in this industry, and the fix for each. Be honest about which ones apply to you.

01 Sending ads to the homepage

Give each practice area and language its own landing page with one clear call to action.

- [ ] We do this today

02 Voicemail after hours

Use live answering or on-call intake for urgent case types and return every missed call within 15 minutes.

- [ ] We do this today

03 Judging channels by lead volume

Track cost per signed case and fees by source, not just leads.

- [ ] We do this today

04 Machine-translated Spanish

Have native speakers write pages and scripts, and staff intake to match what the ads promise.

- [ ] We do this today

05 Incentives for reviews

Ask every client at resolution, offer nothing in return and never filter out unhappy clients.

- [ ] We do this today

06 Copy the bar would flag

Avoid specialist, guaranteed and best claims, and have every ad checked against current state rules before launch.

- [ ] We do this today

SECTION 13 · STARTING FROM SCRATCH

Quick start

If you only have a few hours a week, do these in order.

DONE	WHEN	TASK
☐	**Week 1**	Complete the snapshot, personas and positioning, and do the cost per signed case math for your top two practice areas
☐	**Week 2**	Claim and complete Google Business Profile, Apple Business Connect and Bing Places for every office, and set up review requests
☐	**Week 3**	Call your own firm at lunch and after hours, then add call tracking, a lead source field and a 15-minute response standard
☐	**Week 4**	Build landing pages for your top two case types, in Spanish too if your market calls for it, and review them against bar rules
☐	**Month 2**	Launch Local Services Ads and Google Search Ads for those case types with tight negative keyword lists
☐	**Month 3**	Build the weekly dashboard and schedule touchpoints with your top 20 referral sources
☐	**Quarter 2**	Start the content program and a nurture sequence for research-phase clients
☐	**Year 1**	Review signed cases and fees by source and move budget to the lowest cost per signed case

NOTES

You have the plan. Want a team to run it with you?

MaaS by CodeSM is the outsourced marketing team for consumer-facing law firms in personal injury, family, criminal defense, immigration and estate planning. One team for strategy, creative, paid media, SEO, web and reporting, without hiring a department.

01

A marketing audit

We review your listings, website, reviews, ads and reporting and show you where leads are slipping.

02

See where you stand

We compare your search visibility, reviews and ads with the competitors your customers actually consider.

03

A 90-day plan

You leave with a prioritized 90-day plan: channels, budget, content and KPIs.

04

Or we run it with you

Strategy, creative, paid media, SEO, web and reporting from one outsourced marketing team.

Book a call

trymaas.com/get-a-demo



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