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“When You Can’t Clone Yourself …”

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**Course Description.** Best practices for working with a consultant to complement the day-to-day responsibilities of voluntary bar associations and move your organization to the next level. Whether you’re a large or small Bar, there are always tasks that are outside the realm of CLE/event planning, member care and feeding, membership promotion, meetings and administrative tasks. Learn how to hire an affordable consultant who can create a comprehensive marketing plan, brand your organization’s website and communications, develop new instruments for member development and engagement (awards, networking programs, speakers’ bureau), disseminate effective HTML news briefs that allow you to track click-throughs and determine your readers’ engagement, assist with media relations and member promotions, develop and facilitate long-range planning for your organization and establish community relations programs that can further your publicity reach and encourage new members to join.

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**Welcome and Introductions (Joann Gore).** Joann Gore, Executive Director of the Tallahassee Bar Association, and Lisa Tipton of PR Florida Inc., a public relations and marketing consultant to the Tallahassee Bar Association and The Florida Bar Solo & Small Firm Section.

- **Background.** The Tallahassee Bar Association had in place an excellent email outreach system, numerous signature events, a quarterly newsletter and a good website.

Like many organizations – not only bar associations – the communications structure at that time was mostly “outbound,” sending information out to members, to the circuit and to media about events, members’ accomplishments, awards, etc. This structure didn’t facilitate much two-way dialogue.

The executive director and several of the officers and board members decided it was time to take the organization and its communications structure to the next level.
Why Work with a Consultant? (Joann Gore)

- Hiring a consultant is more affordable than hiring a full- or part-time employee.

- Consultants often have more flexibility for scheduling, and can be available during non-business hours if necessary (no overtime).

- Consultants can handle specialized tasks – graphic design, website maintenance, social media, public relations and marketing development – that the staffed Bar could handle … but who has time?

- Consultants can offer creative energy and a fresh perspective to complement the executive director and board of directors.

- Consultants often come to the table with contacts of their own.

- The Tallahassee Bar Association wanted to “up its game,” and offer new and exciting updates that would attract new members and increase engagement.

- And mainly, because you can depend on your consultant 24/7!

Marketing for Voluntary Bar Associations (Lisa Tipton).

Branding. One of the fundamentals of marketing is branding – creating a theme that flows through all of the organization’s communications, website, social media, etc. This can be as simple as repetition of the same graphics or as detailed as using the same font in all of your communications tools.

- Choose a theme that appeals to all ages of your membership, and identifies who you are and what you stand for.

- The Tallahassee Bar Association’s masthead is the old Capitol building with the TBA logo superimposed on it. This signifies that it is one of the oldest bar associations in the Capitol City, rich with tradition and proud of its heritage.
- **Theme.** The TBA’s marketing campaign theme is “Be a Part of It,” which can mean two things: Join the organization or be a greater part of what’s going on within it. This differs from its slogan, “Enhancing the Profession. Promoting Fellowship. Serving the Community.”

- Carry your theme through your all of your marketing tools: website, social media pages and member communications.

- **Strategies and Elements.** Most marketing campaigns start with research. The Tallahassee Bar had been conducting informal polls of its members and board and believed that it had a good handle on the overall demographics of its membership as well as the association’s key goals and objectives.

- While increasing membership was a key goal, member engagement in monthly meetings and events was also important.

- **Marketing Plan.** TBA’s consultant put together a marketing plan, timeline for events, and roll out of new elements. Key strategies included website improvements, implementation of the “Be a Part of It” theme, an HTML newsletter to track engagement, an enhanced member benefits program, demographic/age-specific awards, events and networking and launch of social media profiles on Facebook and Twitter.

- **Launch.** Once the marketing plan strategies were approved by the TBA Board of Directors, it was time to put together key categories of elements to guide implementation of the campaign: email tactics, content, events and lead generation tactics.

- **Overall Strategies for Success.**
  - Develop a marketing plan that has measurable objectives.
  - See what other bars are doing — no need to reinvent the wheel.
  - Work toward programs that larger bars are running — constantly add new elements to the mix.

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**How to Effectively Manage Consultants (Joann Gore).** Now that you’ve decided to work with consultants, you need to find out the best practices for ensuring that your board – and your members – know that your consultants are accountable and are providing good return on your investment.
The Tallahassee Bar Association works with three consultants:

marketing consultant Lisa Tipton, website consultant Marcia Brimberry of Florida Law Sites LLC and graphic designer Angela Cress of Fast Signs. Each plays a part in making sure that communications and branding work together.

**Keys to management of outside consultants.**

- Regular communications – emails every day; phone meetings at least once a week
- Communicate with all consultants and key members (officers) *at the same time* to ensure that everyone is on the same page
- Request monthly reports that document all deliverables and time worked; make sure board members are aware of progress
- Plan schedules well in advance just like any small-office staffing system
- Appoint committee chairs for key functions – marketing, membership, etc. – so members also are working effectively with the consultants (more bang for the buck)

**Implementation (Lisa Tipton).** Now that your consulting team is in place and you’ve defined your objectives and strategies, it’s time to roll out the elements.

- **HTML newsletters – How to set up and track engagement.** The Tallahassee Bar had done a good job of sending out regular email communications to its members – along with the quarterly the TBA Bulletin newsletter. Obviously, members read the emails because they RSVP’d for events, responded to pro bono requests and nominated members for awards. But the organization had no way to track who was reading emails and then visiting the TBA website (or other organizations’ websites) for more details, reading articles in the Bulletin, etc. The executive director also did not know how many emails were *not* getting to readers, or whether or not emails with attachments were being sent to spam.
- **Using a Newsletter to Track Engagement.** To find out more about audience engagement, TBA decided to implement an HTML newsletter. Basically, HTML means markup symbols and codes inserted in a file that is intended for display on an Internet browser page. The markup tells the browser how to display the words and images for the user. This lets an organization avoid sending attachments, which often are routed directly to spam.

- The TBA uses a mail program called “emma” (myemma.com) but there are numerous others available online. Emma has a special nonprofit rate based on the total number of contacts you have stored online at any time and it is extremely easy to use.

- The Florida Bar Solo & Small Firm Section’s blog shows some example HTML coding. (The emma mail service will allow you to drop in coding, but not view coding for an email set up through the service – it’s a visual-only editor.)

- The goal was to create a format that matched look and feel of TBA’s other communications tools, establish a regular schedule for dissemination, boost reach through social media and share information with fellow local bar associations. TBA now sends out most of its member email communications through the emma mail program so we can see who’s opening, who’s clicking and how we compare to similar mailings. This also reduces the total number of emails going out from TBA in any given month. The TBA News Brief is a compilation of news from the Tallahassee Bar, The Florida Bar, local voluntary bar associations, FSU College of Law and Legal Aid Foundation Tallahassee.

- **Score.** TBA mailings regularly get emma mail scores ranging from 8.0 to 9.8 out of 10. The mailing score displays 24 hours after a mailing is sent. It factors in open rate, click-through rate, shares percentage, opt-out percentage and signup percentage, along with the use of split testing to give a number on a 10-point scale. That number is compared to the averages of 45,000 customers and millions of emails that send through Emma.

- According to MarketingSherpa (according to emma):
  - If you send a newsletter to a mostly consumer-based list, you should expect open rates of roughly 25%.
  - If you send to a newsletter to a mostly business-based list, you should expect open rates closer to 20%.
  - If you send a promotion to a mostly consumer-based list, you should expect open rates of rough 20%.
  - If you send a promotion to a mostly business-based list, you should expect open rates of roughly 20%.

- **Tracking.** Definitive actions that happen while a person is connected to the internet are trackable. When someone views your mailing in its HTML entirety, clicks one of the links back to your website, or forwards your mailing using the Share option the mail program can track this engagement.
- Non-trackable actions: Someone viewing the plaintext version of your mailing and not clicking anything, viewing the mailing offline or someone forwarding your email to others the old-fashioned way, using their email client.

- Emma is able to track two kinds of opens:
  - When someone views the HTML version of the mailing (including the images). So if the email is opened and images are blocked by default in the email client, the open won't "count" until the recipient clicks to download those images.
  - When someone receives the plaintext version and visits at least one of the links. Since there are no images in the plaintext version, the mail program can only track an open if a link in the plaintext version is clicked. If that happens, emma can track the open and the click on the response page.

For this reason, it is highly likely that the true open rate is higher than can be reported, and that some people who won’t appear in your open list have indeed opened and seen your mailing.

- The emma program also allows you to see who clicked where; generally, our member photos and member benefits links are the most popular.
- We also track hard and soft bounces so that we can clean up the email list after each mailing.

Member Benefits. The Tallahassee Bar Association decided to go at this program in a BIG way, and now have more than 25 local vendors who offer incentives, discounts and promotions for TBA members. We are planning a fall mailing of TBA member cards with a list of the vendors, which will be online at TallahasseeBar.org/benefits.

Awards. The Tallahassee Bar Association now offer three new awards – which are being rolled out over a two-year time period – that hopefully will encourage involvement with the organization and foster inclusivity and diversity among its membership.

- Lifetime Professionalism Award. The award honors TBA-member lawyers, judges or law professors who have demonstrated professionalism and dedication to the legal profession for a period of at least 25 years through civil, community, or legal service.

- Martha Barnett Women Lawyers of Distinction Award was established to recognize and celebrate the accomplishments of women lawyers from Florida’s Second Judicial Circuit. The award honors an outstanding lawyer who has achieved professional excellence and who has been an advocate or mentor for the advancement of other women lawyers.

- Champion for Diversity in the Legal Profession Award has been established to recognize the accomplishments of a Tallahassee Bar Association member lawyer, law firm, employer or in-house
corporate counsel who has made measurable progress in the recruitment, hiring, retention, and advancement to leadership positions of lawyers who are racially, ethnically and culturally diverse, women, members of the LGBT community and persons with disabilities. Each year, this award will honor one individual or entity who has demonstrated the above actions as an advocate for diversity and inclusion.

**Events.** The Tallahassee Bar Association host a variety of events: monthly CLEs that are free for TBA members (low-cost for others), monthly membership meetings, annual chili cook-off, legal community conference and others. The key is variety – in both themes and locations – to ensure that your members have access and feel included.

**Social Media.** At its core, social media is about engagement.

- Social media users want to narrow their information sources, streamline the types of information they take in and filter the enormous amounts of information noise they face every day.

- Social media encourages people to engage with each other. Becoming part of The Florida Bar’s online legal conversation – and communities – is an excellent way for your bar association to:
  
  o Obtain information from and about The Florida Bar, legal entities, other bar associations, etc.
  
  o Provide information to all of these groups.
  
  o Publicize your key events, awards and member milestones to a much greater audience than just your membership mailing list.
  
  o Communicate with more immediacy than using only traditional media.
  
  o Target specific audiences who need to hear your news – young lawyers, women lawyers, Florida Bar sections, etc.

- Engagement through social media starts with understanding how to connect your bar association’s message to the larger body of information that is being generated by the minute in online communities. Effective use of hashtags, tagging people and entities appropriately and watching for opportunities to join conversations are all ways to increase your association’s reach.
What’s Next? Long-Range Planning (Joann Gore). Once you’ve established a solid foundation and have a good team in place, don’t stop there! The sky’s the limit for the next project … and the next one.

- Long-range planning is key to ensure that each new slate of officers works within an approved structure for organizational growth – and that each new group doesn’t undo what its predecessors established.

Forward Progress. Here are some ideas that the Tallahassee Bar will be implementing and exploring; feel free to use them for your association!

- Destination CLE (Fall 2016)
- TBAadventurevacay photo gallery and social media features on TBA members on adventure vacations
- Attorney breakfast clubs (“leads groups”)
- Monthly free CLEs (ongoing)
- Newcomers receptions at membership meetings
- Local bar association vendor/exhibit “fair”
- Speakers bureau (local schools, universities, civic groups, law firms and lawyers who should be TBA members)
- Ongoing visits to fellow local Bar association meetings
- Firm or Member of the Month
- Community involvement in a signature cause

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