



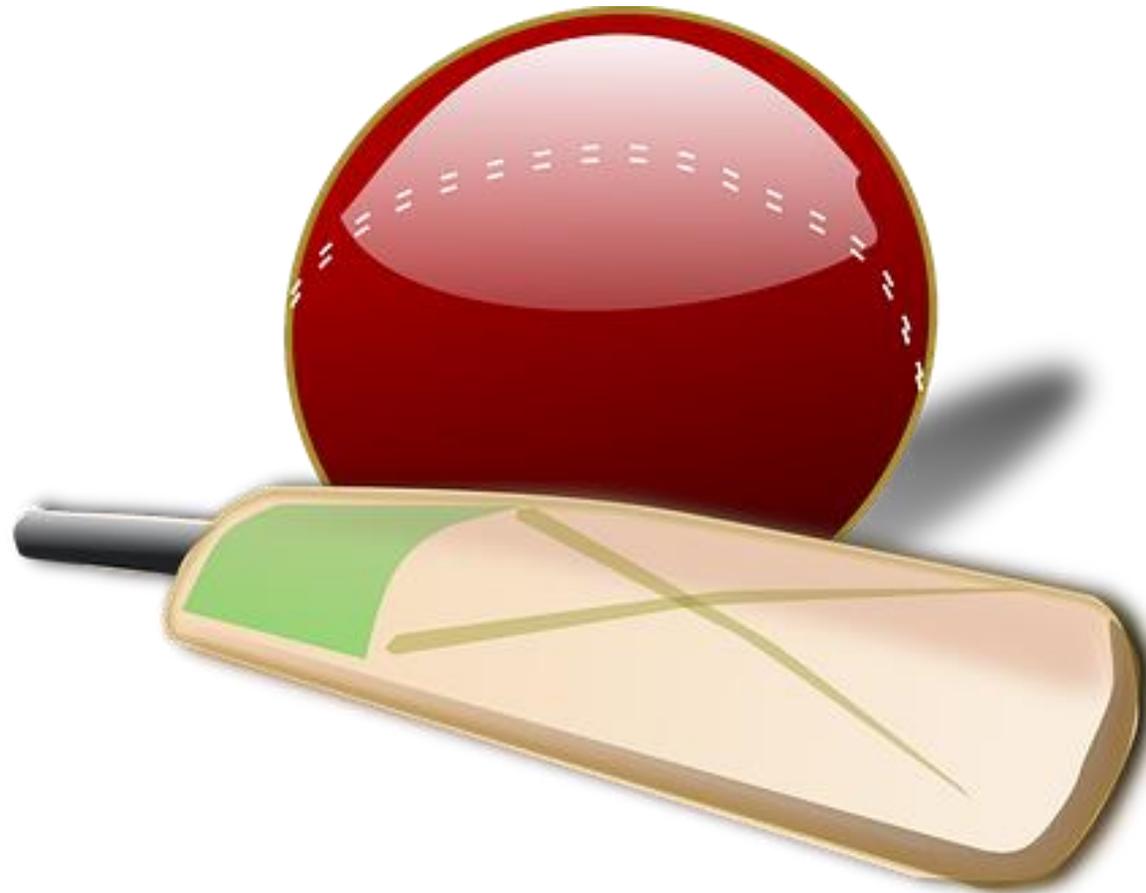
Probate Marketing Top 10 Things To Do

Presented by
Vicki Banthorpe

Setting the scene



The probate batting order





1) Who's your target audience?

- Staff
- Clients:
 - HNIs
 - Business owners
 - The elderly
 - IHT/Estate/Succession planning clients – cross sell
 - Their family & friends
- Care home owners
- Funeral directors





1) Who's your target audience?

- Prospective Clients
- Strategic Alliances:
 - Solicitors – non-probate, contentious probate specialists
 - Will writers
 - IFAs





2) Confirm your message

- Educate:
 - Accountants can now do probate work
 - Likely to be cheaper and quicker than local alternatives
 - First accountant in your town/county?
- Free offers:
 - Guidance on the probate process – what to expect
 - Reviewing Wills (aim to be the executor/probate practitioner)
 - ‘Putting your affairs in order’ – what to consider





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3) Create a marketing calendar

- Spread out your marketing activities
 - Something happening throughout the year
 - Spread out resources and cash flow
- Communicate with all target audiences
- Monitor what you've done, what's planned in and what needs adding/changing





4) Your staff

- Tell them:
 - How the new probate service helps clients
 - Who are the licensed practitioners/who to go to
 - Why you're better placed than the banks and solicitors
 - What they need to look out/listen for
- Get them to mention it to family and friends
- Keep reminding them – how you've helped, cost comparisons, feedback from clients





5) Update your website

- Separate probate services page
- 2-way links from probate to ancillary services
- Easy to find
- Downloadable guides
- Key search terms “probate” in ‘your town’”
- Google AdWords – linking to probate web page





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6) Produce a brochure/leaflet

- Probate and ancillary services
- Hand out during meetings and send with letters
- Likely to be kept with personal papers
- Brand awareness: Your Firm = Probate
- Don't DIY!





7) Write to your clients

- Letter not email
- Within 3 months of launch
- Link to other services
- Include leaflet
- Write once a year – different emphasis/offer, same aim – “we do probate”





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8) Advertise

- Parish / town magazines
- Glossy regionals – targeting HNIs
- Bus Adverts
- Company car signage





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8) Advertise

- Accompanying editorial
- Repeat to gain momentum
- Change the message, retain the branding





9) Talk about it!

- Networking events
- Business socials/charity events
- Friends and family
- Staff



“How’s business?” = “Fine thanks” = **NOOOOOOOOO**

“How’s business?” “Great, we’re just launching our new probate service”



10) Newsletters

- Article to launch the new service
- Mention 2 – 3 times a year
- Not just probate – link with IHT, Trust/Executorship news, reviewing Wills





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SWAT UK Probate Manual

www.swat.co.uk/Manuals/SWATUKProducts/ProbateManual.aspx

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Probate Marketing – Top 10 Things To Do



Conclusion – Top 10 Things To Do

1. Target audience
2. Messages
3. Marketing calendar
4. Staff
5. Website



6. Leaflet/brochure
7. Client letter
8. Adverts
9. Talk about it
10. Newsletters



- 1. Free probate marketing review**
- 2. Free monthly marketing e-shot – tips and info to help you market your practice in general**

Any Questions?

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www.momentumforprofessionals.co.uk