

CASE STUDY

Morgan & DiSalvo Leverages Digital Marketing to Recession-Proof Estate Planning Practice



When Founder Richard Morgan of estate planning law firm Morgan & DiSalvo, P.C. saw referrals from allied professionals, such as accountants, financial planners/investment advisors, bankers/trust officers, life insurance professionals and other lawyers, virtually stop during a recession, he knew he had to find a way to consistently attract new clients regardless of prevailing financial headwinds.

"Our usual referral sources were spending all of their time calming their clients who were alarmed about an ongoing significant recession," Morgan said. "For them, planning was put on the back burner, and as a result, making referrals to handle estate planning matters was put on pause."

Morgan searched for answers. The result of this research was the combination of potentially good ideas into a new theory of how a law firm can efficiently get new clients. Morgan called it "DESC" for short, which stood for drive, educate, sift (qualify) and convert. He wanted to drive potential clients to the firm's website, provide them with incredible estate planning related education on the website, sift (qualify) potential clients so they can self-select if they may want to consider using our services and then converting those who believe they may want to use our services to contact us for a free initial estate planning meeting.

Morgan initially hired a web development firm to rebuild their website, but he encountered frustration. So, he went back to researching who would be best to help carry out his vision.

For help, he turned to Jennnifer Koon at Michael Mackenzie Communications (MMC), a full-service marketing agency. She had been one of a few professionals who had created the firm's letterhead, colors, logo and initial website when their use of the internet for marketing purposes was still in its infancy. This time around she was to help carry out Morgan's DESC vision. Jennifer had discussed with Morgan that Google's algorithms for organic (non-paid) search prioritized trusted website content to help answer user questions. This would work perfectly with Morgan's desire to have a significant educational focus on the updated website. While other web marketing professionals were focusing on shortcuts to being highly ranked by Google, Morgan was happy to play the long game by providing superior web content.

The first MMC assignments were to help create a modern and more updated website to carry out the DESC strategy, as well as to facilitate the creation and publication of newsletters on a consistent basis without getting blacklisted as spam. These newsletters could then be used to keep in contact with allied professionals and firm clients, as well as filling out the

About Morgan & DiSalvo

Morgan and DiSalvo, P.C. is led by attorneys Richard Morgan and Loraine DiSalvo. Their reputation for personal service and compassion, combined with their expertise in estate planning, tax law, probate, and estate and trust administration, has earned Morgan and DiSalvo the highest ratings from multiple attorney rating agencies, including the well-respected Martindale-Hubbell Peer Review Rating every year since the firm's inception in 1995. Additionally, the firm is recognized by Best Law Firms as one of the few in Georgia

to achieve its "Tier 1" Best Law Firms rating in Trust and Estate Law. The firm has also been honored by Super Lawyers and Five Star Professional for its outstanding legal service. Morgan & DiSalvo was one of only four Atlanta firms recognized by Chambers and Partners in their initial Chambers Spotlight Georgia guide for excellence in Trusts & Estates Law. For more information, visit www.morgandisalvo.com.





educational content for the updated website. The partnership between Morgan and MMC was born.

SEO Strategy Helps Potential Clients Find Morgan & DiSalvo

"I wanted our website to be highly informational," Morgan said. "MMC encouraged us to use valuable rich content to prove to our site visitors that we were the best possible partner to guide them through the intricacies of estate planning."

Now, 15 years later, Morgan & DiSalvo continues to work with MMC as its marketing partner with a more recently released version 3.0 of their website supporting the robust, high-performing proprietary content amassed over the years.

The site content covers the gamut of Estate and Tax Planning topics and includes guidance on Probate and Estate Administration as well. Additionally, an online Resource Center features an Estate Planning Resource Guide, Case Studies, a Knowledge Base and Frequently Asked Questions. MMC tags each of these individual pieces of content with keywords to help Morgan & DiSalvo maintain their high rankings with key search engines.

In addition to posting a wealth of estate planning content, newsletters are emailed to clients, allied professionals and others who sign up on the firm website.

Morgan not only authors all the long-form newsletter content for the site, but he also regularly updates legal content as legalities change. To be fully transparent, he includes a "last update" reference on each piece of content after being updated to assure website visitors the content they are reading is fresh and accurate.

MMC extends his efforts by writing and posting fresh blog and page content to the site monthly. This ongoing content buildout effort continually optimizes the site's ranking on leading search engines and with generative AI then helps convert site visitors to prospects. MMC also curates the site's overall content to expand both written content and videos around topics with high interest.

Precise Prospect Qualification Process

"We are not a low-cost provider of estate planning services," Morgan said. "We want prospects to know that up front. Our Prospect Qualification Process helps us screen out potential clients who are not a good fit for the firm early in the process – before we spend significant unbillable time discovering that for ourselves."

Based on its collaboration with Morgan & DiSalvo to build a profile of a desirable prospect, MMC created and implemented a multi-step prospect qualification process on the site that pushes qualified leads directly to Morgan and his staff for follow-up. First, a website visitor interested in learning more about Morgan & DiSalvo's services completes an inquiry form online or calls the firm directly. At that point, a staff member explains the firm's estate planning process, timing and cost.

"To confirm that the prospect is serious about working with the firm, we have them complete a short estate planning questionnaire and a simple one-page financial balance sheet for us," Morgan said. "We also ask that they forward us a copy of their current estate planning documents. I will review these documents prior to our initial meeting, so that this initial meeting can be as productive as possible for both of us."

Completing the qualification steps in Morgan's layered approach, which he calls "sifting," advances originally unqualified site visitors into the qualified prospect stage and on to qualified potential client status as they complete the steps. Morgan & DiSalvo's consistently high conversion rate – from unqualified site visitor to qualified prospective client – proves that sifting is working.

Prospects Want to See Client Reviews

As is true in most important life decisions, prospective clients wanted to know what other clients' experiences have been with Morgan & DiSalvo – before they make that first phone call. Clients' reviews on trusted third-party sites, coupled with the firm's content-rich website, offer Morgan & DiSalvo a "one-two punch" that sets the firm apart in the competitive estate planning space.



"After we complete a client's estate planning, we ask them to write a review for us," he said. "We only ask once and we offer them three options – Avvo.com, Lawyers.com and Google.com. We strive for our clients to end up really happy that they hired us to assist them with their important estate planning related matters, and our efforts have paid off with an extensive number of client reviews on these trusted third-party sites."

To highlight the extent and depth of Morgan & DiSalvo's positive reviews, MMC added an integration tool to the firm's website which allows site visitors to view the client testimonials in real time – without leaving the site. The combination of learning about the details of estate planning and seeing positive experiences from others who previously used Morgan & DiSalvo's services helps site visitors understand that Morgan & DiSalvo may be the perfect firm to assist them with their important estate planning related matters.

This significant listing of client testimonials, which is curated by MMC, boosts Morgan & DiSalvo's search engine rankings. Further, it strengthens the firm's reputation as one of the premier estate planning firms in the metropolitan Atlanta area.

Maintaining Valuable Third-Party Rankings

In the legal field, potential clients also evaluate legal firms by third-party rankings. Morgan & DiSalvo has maintained the highest ratings from multiple attorney rating agencies, including the well-respected Martindale-Hubbell Peer Review Rating every year since the firm's inception in 1995. Additionally, Morgan & DiSalvo is recognized by Best Law Firms as one of the few in Georgia to achieve its "Tier 1" Best Law Firms rating in Trust and Estate Law. The firm has also been honored by Super Lawyers and Five Star Professional for its outstanding legal services. Morgan & DiSalvo was one of only four Atlanta firms recognized by Chambers and Partners in their initial Chambers Spotlight Georgia guide for excellence in Trusts & Estates Law. This special edition highlights small- to medium-sized firms that deliver exceptional legal service and personalized attention beyond what's typically found at larger firms.

MMC manages the extensive submission and qualification activities required by these third parties for inclusion and ranking.

Keeping online firm profiles updated is another important activity Morgan delegates to MMC. Optimizing these online profiles, listings and rankings to assure maximum lead generation from each of these resources for consumers and allied professionals is a vital component of the marketing effort. In addition, MMC constantly scans the legal and local landscapes to identify new opportunities for firm recognition.

Content Outperforms Networking for New Business

MMC also helps Morgan & DiSalvo stay in touch with clients who have completed their estate plans. Using a combination of frequency marketing and email campaigns, MMC contacts the firm's clients to invite them to update their plans when life circumstances change.



"As a 30-year-old firm, we are seeing clients come back to us to review their estate plans, and they are sending their friends," he said. "It is important to keep the pump primed because we know that if we stop communicating with past clients and allied professionals, they will stop referring. Out of sight, out of mind."

While Morgan continues to network with referring allied professionals, give speeches and write articles, he points out that his firm's digital strategy has been more consistently productive than these other client-attracting tactics.

"While growing our firm takes the effort of both our digital marketing efforts along with MMC and continuing to network with allied professionals, there is no question that we have gotten more and more clients from our digital marketing efforts with MMC – both on and off our website – in conjunction with our robust site content than we have gotten from allied professionals," Morgan said. "For us, content marketing has proven to be critically important, and way more effective than networking alone."