

**Innovation in Trusts & Estates Law 2021**  
OBA Professional Development Webinar

**SOCIAL MEDIA & TECH IMPLEMENTATION**  
By Kimberly A. Whaley



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# Innovation in Trusts & Estates Law 2021

- How I've Implemented Social Media and Tech at my Firm, and Why I Won't Turn Back
  - Personal stories about social media and technology
  - What impact has this had on business and client management?
- Cassandra Martino, Elm Law
- Kim Whaley, WEL Partners



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# Innovation in Trusts & Estates Law 2021

- Key areas where Technology impacts firm
  - Operations
  - Marketing



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- Operations:
  - Client Management Systems
    - Electronic documentation / filing
    - Intake and conflict checks
    - Docketing and billing
- Results:
  - Efficient intake, tracking, filing, and billing
  - Reduced environmental impact – less paper and storage



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# Innovation in Trusts & Estates Law 2021

- Office Technology (Pre-Pandemic):
  - Dedicated audio / video conferencing hardware
  - Electronic whiteboard / video board
  - Owned and managed file / email servers
  - All lawyers provided laptops with secure remote connection to office network (all files)
- Results:
  - Enhanced connectivity
  - Ability to work remote and securely access all files and emails on mobile devices and laptops
  - Efficient / 'live' document development and creation during working sessions and client meetings (i.e. Minutes of Settlement during Mediations)



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- Office Technology (COVID enhancements):
  - Additional mobile connectivity, laptops to all support staff and clerks in addition to lawyers
  - Upgrades to remote working hardware when necessary to ensure smooth audio / video conferencing, enhanced remote access
  - ZOOM meeting software and secure corporate account
- Results:
  - Seamless client services via remote connections
  - Remote access to online Courts wherever staff located
  - Lawyers, support staff all connected and operating efficiently



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# Innovation in Trusts & Estates Law 2021

- Marketing Technology – Database / Newsletter:
  - Key marketing contact database developed (2,000+ names)
  - Ability to reach key contacts via monthly Newsletter (10+ years)
  - Opt in / opt out mechanisms
  - CASL compliant
- Results:
  - Information sharing and education reinforce practice area leadership and expertise
  - Average +30% open rate for Newsletter, generates significant website traffic dialogue and direct inquiries



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# Innovation in Trusts & Estates Law 2021

- Marketing Technology – Blog:
  - The WEL Blog posts news, case commentary, published papers, upcoming events
  - Over 1,500 posts in 10 years
  - Central hub for marketing communications and information sharing
- Results:
  - Drives significant website traffic (+5,000 page views / month)
  - Reinforces practice area leadership and expertise
  - Frequent posts drive Search Engine Optimization and increases organic search performance on Google



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# Innovation in Trusts & Estates Law 2021

- Marketing Technology – Social Media:
  - LinkedIn: 2,500 connections - Twitter: 915 followers - Instagram: 440 followers
  - Social media channels used to create awareness and expand the reach of Newsletter and Blog posts to wider audience
  - Ability to easily share and engage directly with readers through dialogue on key subject areas
- Results:
  - Key driver of traffic to website
  - Low cost, high return
  - High levels of direct engagement
  - Increases Search Engine performance
  - Reinforces practice area leadership and firm positioning



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QUESTIONS?



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