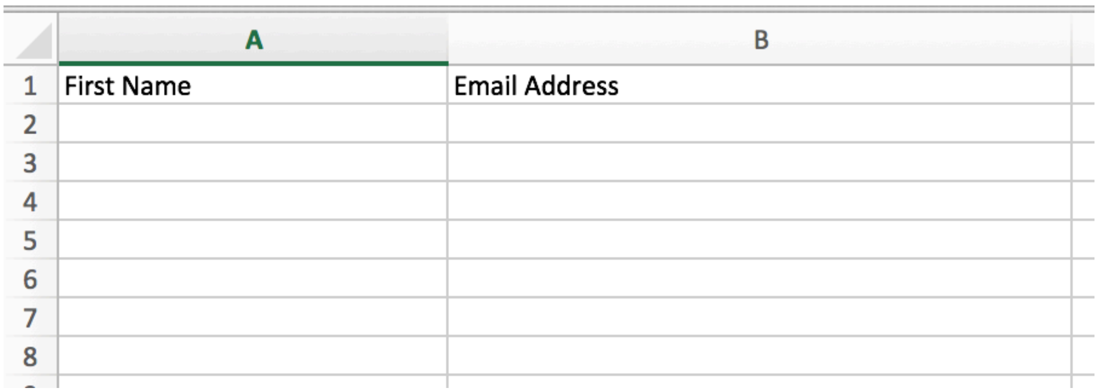
Instructions for Building Your Initial Newsletter Email List

Step 1 – Generally

Open the "**Excel Template for Email List Building**" that was also attached to this email. Generally, your job will be to simply fill out **Column A (First Name)** and **Column B (Email Address)** for each person that you want to add to your newsletter. However, before you start, please review the steps below.



Step 2 – Categories

Notice at the bottom of this document, there are multiple sheets labeled, "**Attorneys**," "**Clients**," "**Personal**," "**Custom 1**," and "**Custom 2**."

Each of these sheets identify the type of person the contact is to you. For example, "**Attorneys**" are lawyers that you personally know that are a potential referral source. These different categories are set up so that we can send targeted email to certain categories of your referral network.

Step 3 – The Main Categories

- "**Attorneys**" – means other lawyers in your referral network who are (or may be) in a position to refer cases to you in the future. This should include any lawyer that you've personally interacted with and want to maintain contact with. Don't be shy! Add as many as you can.

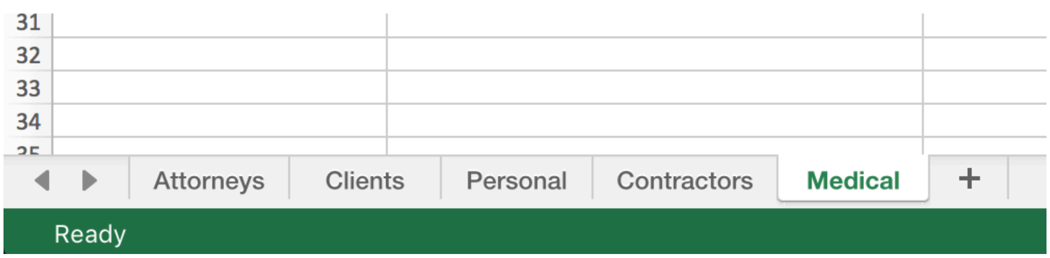
- "**Clients**" – means any *current* and *former* clients that you want to stay connected with for more business.
- "**Personal**" – means any family, friends, old work colleagues, church members, social group friends, or anyone else that you want to stay connected with.

At a minimum, you should fill out **Column A** and **Column B** for the main three categories: "**Attorneys**," "**Clients**," & "**Personal.**" If you desire to have custom categories, please go to the last step.

<u>Step 4 – Custom Categories</u>

If you would like to send targeted newsletters to a specific group of people beyond the main three categories, you can. You need to identify those individuals for us by using the two Custom sheets that I've created – "**Custom 1**" and "**Custom 2.**"

For example, if you service a lot of clients in the construction and medical industries. You should ***rename*** "**Custom 1**" and "**Custom 2**" to "**Contractors**" and "**Medical**" See example below.



Obviously, some contacts may fall into more than one category. In our "**Contractor**" example, many of these individuals probably fall in the "**Clients**" category as well as the custom "**Contractors**" category. ***Add these individuals to both categories.***

<u>Step 5 – Continuously Add More People</u>

Each month you will receive multiple emails from me prompting you to add all new contact to your email list. The goal being to continue to build your list. Don't be shy! The more the better!

End.