

# Law Firm Saves Thousands of Dollars a Month with Infusionsoft

## BACKGROUND

Dave Hiersekorn's private practice focuses on wills, trusts and estate planning to help people put their affairs in order and take care of their families. PrivateCounsel is an education-based business, and it's Hiersekorn's mission to ensure his clients understand the process and their legal services. He says one of the legal profession's missing pieces is that clients often receive services without fully understanding the purpose.

## CHALLENGES

During PrivateCounsel's early years, Hiersekorn and his team developed an intricate system to market the company. This included contracting a marketing fulfillment company for the design of their materials; hiring an office marketing specialist; and executing such events as dinners and seminars for their referral sources.

"The big problem with our initial marketing efforts was cost; we were spending about \$20,000 a month," says Hiersekorn. "That was more than we wanted to spend so we went looking for a better solution." In addition to the high cost, Hiersekorn's team was spending a lot of time performing what he considered repetitive tasks, like connecting with leads and referral sources using the same collateral.

## SOLUTION

"One of the greatest benefits of Infusionsoft is that when we need to focus on marketing, Infusionsoft follows up and handles fulfillment," says Hiersekorn. "When we switch our focus to fulfillment, Infusionsoft handles automating our marketing. It's like having another full team to help, and this dramatically smoothed out our workflow." Now, PrivateCounsel can give all their clients the right amount of attention. While the staff still performs personal outreach, they leverage Infusionsoft's Web forms and email automation to enhance their client relationship management.

## RESULTS

In terms of dollars and cents, Infusionsoft helped PrivateCounsel save more than \$20,000 a month in marketing services. But on a personal level, Infusionsoft did so much more. A year and a half after implementation, Hiersekorn's daughter, Marlee, was born with a genetic heart defect.

"In the past nine months, I've been out of the office more than I could've ever imagined, and truthfully, I would have gone out of business if it weren't for the fact that I had Infusionsoft keeping everything on track," says Hiersekorn. "To me, Infusionsoft is not just a tool or software; it's something that has changed the way I will manage the rest of my career."

*"With Infusionsoft, I've been able to turn my greatest weakness (following up with prospects and leads) into a competitive advantage."*

– David Hiersekorn  
Estate Planning Attorney, PrivateCounsel

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## FAST FACTS

**Company:** PrivateCounsel

**Owner:** Dave Hiersekorn

**Employees:** 4

**Revenue:** \$250,000–\$1,000,000

**Years in Business:** 4

**Industry:** Estate Planning

**Location:** Placentia, Calif.

**Customer Since:** November 2009

**Website:** [privatecounsel.com](http://privatecounsel.com)

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