

MARKETING STRATEGY

Equinox

Business Law Group

A 12-month plan to build a predictable pipeline of fractional general counsel clients - and the system to run it with a lean team.

Prepared by AI Smart Ventures

Strategic Legal Counsel For All



THE OBJECTIVE

The goal



Build a predictable pipeline of qualified **fractional general counsel (GCS)** clients - getting in front of \$10M+ businesses that already spend on legal, and converting them with a repeatable engine a one-person marketing team can run.

3-5

new GCS clients per quarter - the near-term definition of success

\$7K+

target monthly value per client (current average ~\$3.5-4K)

Nov 1

the cycle we're building for - July-Sep seeds the fall close

STARTING POINT

Where Equinox stands today

This isn't a strategy gap - the brand, personas, and messaging are strong. It's an execution and revenue-operations gap. We build on the assets and fix the engine.



Strong foundation to build on

- Mature brand system, deep content library, and clear personas
- Proven GCS model: ~35 clients, fixed-fee, highly retentive (10+ yr clients)
- Segmented "mini legal update" already hitting 47% open / 22% click
- Existing Business Health Assessment funnel + In Balance newsletter
- Warm access: EO Seattle, WPO, CFO Council, Family Business Exchange



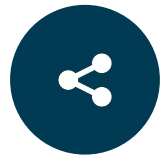
What's holding the pipeline back

- Pipeline is referral-dependent (~10 leads/mo) and unpredictable
- Website foundations: thin metadata, headings, no FGC landing page or pricing
- Social is LinkedIn-only, ad hoc, with no documented cadence
- Website-visitor tracking (RB2B) and the 4–5K Pipedrive list sit largely unworked
- All execution rests on one person - capacity before volume

HOW WE'LL WORK

Six areas of focus

Every phase works these same six levers together, so content, channels, and conversion reinforce each other instead of pulling a lean team in different directions.



Social Media

A real cadence across LinkedIn, YouTube, Pinterest and more - company and human accounts working together.



Website & SEO

A website fixed for SEO and AI search, organized around the audiences Equinox serves.



Promotions & Advertising

Earned and paid demand turned on where Equinox already has access.



Marketing Assets

A reusable, on-brand asset and content system powered by AI.



Events & Engagement

Systematic work of EO, WPO, CFO Council, and referral partners.



Email Marketing

Segmented nurture from the newsletter, legal update, and website data.

THE ROADMAP

A four-phase plan

The order is deliberate: first make the pipeline visible and fix what converts, then turn on demand, capture it, and finally keep it running predictably.

01



JUL-SEP

Consolidate & Refresh

Get the house in order - fix what converts before adding any volume.

KEY MOVES

- Website + SEO fixes
- FGC landing page with tiered pricing
- Pipedrive stages + weekly numbers review
- BHA front door; newsletter re-intro

02



OCT-DEC

Engagement & Expansion

Build the always-on, fresh-content engine and turn on demand where access exists.

KEY MOVES

- Owner / CFO / HR topic hubs + SEO
- Multi-account LinkedIn cadence + carousels
- Speaking pipeline → video & YouTube
- Work EO / WPO / CFO rooms + referral partners

03



JAN-MAR

Optimization & Growth

Capture the demand, convert more of it, and prove paid before scaling.

KEY MOVES

- Pricing & comparison content (vs. hourly / in-house)
- Case studies with real numbers
- Targeted LinkedIn / Google / Meta ads test
- Pinterest + YouTube; à-la-carte → GCS bridge

04



APR +

Analytics & Refinement

Measure what matters, refine the engine, and keep the pipeline predictable.

KEY MOVES

- Weekly review of the four numbers - leads, consults, proposals, signed - one owner each
- Double down on winning content
- AI-sharpened list segmentation
- Internal comms; quarterly recalibration

PHASE 01

Consolidate & Refresh



Capacity before volume - fix what converts first.

THE FOCUS

Get the house in order before adding any volume. We make the existing pipeline visible and repair the front door that turns interest into signed GCS clients.

THE WORK

Fix the website foundations, create a real fractional-GC landing page with pricing, instrument the pipeline in Pipedrive, and turn the existing assets and newsletter into working lead tools.

THE OUTCOME

A working pipeline that tracks every lead, source, and stage in Pipedrive, plus a website with the metadata, headings, FAQ schema, and a priced FGC landing page that convert visitors into qualified leads.

Getting the house in order

Foundation work - the unglamorous fixes that make everything after them pay off.



Website & SEO

Fix the foundations

Repair metadata, page titles, and heading structure across the website, and add FAQ schema so pages surface in search and AI answers.

Fractional GC landing page

Build a dedicated page - moved high on the homepage - explaining who FGC is for, with tiered pricing and a fixed-vs-hourly comparison.

Polish the blog

Clean up the migrated blog's formatting and layout so existing content looks as credible as it reads.



Social Media

Document the cadence

Capture the current LinkedIn rhythm - day, time, account, post type - so we know what's working before changing anything.

Build the human accounts

Set up Michelle's, Pamela's, and Laura's personal accounts for unpaid, human-account reach, starting with a LinkedIn-native newsletter on Michelle's.

Reshare framework

Give the team a simple, expected way to amplify company posts and extend organic reach.

Wiring up the funnel



Promotions & Advertising

BHA as the front door

Promote the Business Health Assessment as the consistent entry point instead of leaving it unseen on the site.

Clean routing

Make sure every assessment and form lead lands in Pipedrive with its source attached.



Marketing Assets

Organize the library

Audit brand, social, and BHA assets into one on-brand system in Canva, accessible by an AI agent, that the team can pull from.

Templatize the proposal

Turn the GCS proposal into a fast, repeatable template to cut the cycle time stalling deals.



Events & Engagement

Instrument the pipeline

Define GCS stages in Pipedrive and backfill lead source across the existing list.

Weekly numbers review

Start a standing 30-minute review of the four pipeline numbers - leads, consults, proposals, and signed clients - with one owner each.



Email Marketing

Re-introduce FGC

Add a recurring "What FGC did for someone this week" section atop the In Balance newsletter.

Tag & clean the list

Tag the 4–5K Pipedrive list by persona and clear out stale contacts so later sends can be targeted. Address spam issues and email setup for better delivery.

Where AI fixes the foundation



Website & SEO

AI-drafted SEO pages

Use AI to auto-write metadata, page titles, and FAQ schema so every page is optimized for search and AI answers without manual effort.

AI keyword + gap finder

Let AI map the fractional-GC and WA business-counsel terms you should rank for, then draft the pages to fill them.



AI SEO engine

Set up the AI SEO tool

Set up OpenForge to draft SEO'd posts into WordPress with the metadata green-lights the site is missing.

Auto-generate FAQs

Use the tool to create the FAQ content your pages need to surface in search and AI answers.



Lead capture

Smart legal health check

Rebuild the health-check tool as a more interactive, dynamic AI powered experience that captures and qualifies leads.

Instant tailored report

Have it generate each visitor's report and route them into Pipedrive to start the conversation.



Email & CRM

AI-assisted list tagging

Use AI to tag the 4–5K Pipedrive list by owner, CFO, and HR persona instead of doing it by hand.

Mine current clients

Use the tags to surface current clients never introduced to general counsel.

PHASE 02

Engagement & Expansion



Show what FGC does - don't just tell.

THE FOCUS

Build the always-on, fresh-content engine and turn on demand in the rooms where Equinox already has access and authority.

THE WORK

Launch audience topic hubs with AI-assisted SEO, roll out a multi-account LinkedIn cadence, repurpose Michelle's speaking and podcast footage, and work EO, WPO, CFO Council, and referral partners systematically.

THE OUTCOME

A steady flow of relevant content and warm conversations that grow reach and feed the pipeline - without overwhelming a lean team.

Turning on the engine

Reach and relationships - putting content and presence to work where it counts.



Website & SEO

Audience topic hubs

Set Up Owner, CFO, and HR pillar hubs, each answering the questions those buyers actually ask.

AI-assisted SEO engine

Use the SEO tool to auto-draft on-brand posts to the website, targeting fractional-GC and WA business-counsel terms.

Keyword coverage

Map and fill the priority keywords Equinox should rank for but currently doesn't.



Social Media

Multi-account cadence

Roll out a posting rhythm across Michelle, Pamela, and Laura - weekends for owners, midweek for CFO/HR.

Introduce carousels

Add carousels and article-tagged posts to the LinkedIn mix beyond plain articles.

Targeted variants

Reframe each article three ways to speak directly to owners, CFOs, and HR leaders.

Showing up where it counts



Promotions & Advertising

Sharpen the AI POV

Develop a clear AI use-policy and governance point of view - "what NOT to put into AI" - to pitch for stages.

Speaking pipeline

Build a target list of podcasts and events and pitch Michelle's POV proactively.



Marketing Assets

AI marketing agent

Build an AI marketing agent that repurposes Michelle's podcast and speaking footage into short clips - and helps create new content from it.

Launch YouTube

Create an indexable YouTube channel seeded with those clips.



Events & Engagement

Work the rooms

Systematically engage EO Seattle, WPO, Family Business Exchange, and CFO Council with a plan for each.

Formalize referrals

Put structured agreements in place with HR, CPA, and banking partners.



Email Marketing

Segmented sends

Use AI to expand the mini Legal Update into tailored Owner / CFO / HR versions. Keep an eye on deliver rates and spam numbers.

Identify & nurture site visitors

Route identified website visitors into Slack and Pipedrive, with a 5-email welcome sequence.

Where AI builds the engine



Content & SEO

Daily AI content (OpenForge)

Let the tool surface content opportunities and draft posts, each with a page title and the AI prompt to write it.

Audience topic hubs

Build owner, CFO, and HR hubs so every question those buyers ask gets content.



Thought leadership

AI-law POV content

Turn Michelle's AI use-policy and governance POV and speaking engagements into content that positions Equinox as the AI-era legal guide.

Voice + opinion agent

Train AI on Equinox's content so drafts carry Michelle's voice and a nuanced opinion, reviewed before publishing.



Email & newsletter

AI-assembled newsletter

Let AI assemble the newsletter and pull in the article getting the most organic search traffic.

Tailored Legal Update

Use AI to spin the mini Legal Update into Owner, CFO, and HR versions, which is manual today.



Social & video

Human-account newsletters

Publish LinkedIn newsletters & articles on Michelle's, Pamela's, and Laura's accounts for the unpaid reach LinkedIn gives humans.

Clip existing footage (Opus)

Use Opus to chop Michelle's podcast and speaking footage into captioned clips to seed YouTube.

PHASE 03

Optimization & Growth



Meet buyers where they're searching - including AI.

THE FOCUS

Capture the demand the engine is now creating, convert more of it, and put paid behind the channels that already work.

THE WORK

Launch the pricing-and-comparison content series to win AI search, run a targeted ads test funded by the freed EO Portland budget, add Pinterest and YouTube reach, and nurture à-la-carte buyers into GCS plans.

THE OUTCOME

More qualified leads, a shorter path from interest to signed plan, and channels proven before they scale.

Capturing & converting demand

Turning attention into pipeline - and proving paid before scaling it.



Website & SEO

Own the pricing question

Launch a pricing-and-comparison content series - fractional GC vs. hourly vs. in-house - to win the queries buyers ask AI.

Case studies with pricing

Publish client stories framed around cost and value, anonymized where the necessary.

Conversion polish

Tune the highest-traffic pages and CTAs using Hotjar and visitor behavior.



Social Media

Pinterest boards

Build per-audience boards on this indexable, high-authority platform to feed AI search.

Repurpose visuals

Reuse existing blog and BHA imagery as pins and posts at low effort.

YouTube cadence

Move from seeded clips to a regular short-form publishing rhythm.

Proving paid & scaling reach



Promotions & Advertising

Targeted ads test

Run a measured LinkedIn / Google / Meta test funded by the freed EO Portland budget.

Lookalike & retargeting

Build audiences from website-visitor and email data to focus the spend.



Marketing Assets

AI voice & opinion agent

Train an agent on Equinox (Michelle's) content so one person can produce on-brand drafts, human-reviewed.

Asset refresh

Update the highest-use templates as the content engine matures.



Events & Engagement

Leverage appearances

Create a pre/post-event content system to squeeze full value from each podcast and conference.

Inbound-link strategy

Decide deliberately what links and landing pages each appearance should point to.



Email Marketing

Nurture à-la-carte buyers into GCS plans.

Add sequences that move à-la-carte buyers toward an ongoing general counsel plan.

Re-engagement

Win back lapsed contacts in the 4–5K list with a targeted offer.

Where AI captures demand



Lead capture

Identify site visitors

Use Snitcher or RB2B to see who's on the site and what they read, feed leads into Pipedrive.

Automate nurture + retarget

Trigger email sequences at a visit threshold, and build ad audiences from captured emails when you test paid.



Win the pricing question

Pricing & comparison content

Publish pricing pages, comparison guides, and case studies, since buyers now ask AI for pricing that few firms answer.

Climb above big firms

Produce this content at a steady clip to rise above larger firms in AI search.



Video & YouTube

Build the YouTube channel

Turn articles and clips into YouTube summaries; YouTube is fully indexed and ranks in AI search.

AI scripts + video

Use a custom built smart "Notebook" in NotebookLM to find hot YouTube questions and draft scripts; add AI avatar or Michelle-led videos.



Pinterest

Per-audience boards

Build Pinterest boards for each audience, reusing blog images, to borrow Pinterest's high domain authority.

Feed AI image search

Pinterest is fully indexed, so your pins surface when AI returns images and answers for a question.

PHASE 04

Analytics & Refinement



One owner per number - refine what's working.

THE FOCUS

Measure what matters, refine the engine, and keep the pipeline predictable quarter after quarter.

THE WORK

Run the weekly leads, consults, proposals, and signed review, sharpen Pipedrive segmentation with AI, double down on the top-performing content, and stand up an internal-comms rhythm to keep the whole team aligned.

THE OUTCOME

A self-correcting system that reliably produces 3–5 new GCS clients a quarter - and keeps improving.

Keeping it predictable

The discipline layer - measure, learn, and double down on the winners.



Website & SEO

Double down on winners

Track domain authority, AI visibility, and organic leads, and expand the top-performing hubs.

Prune & refresh

Retire or rewrite content that isn't earning attention so the site stays sharp.

Technical health

Keep metadata, speed, and schema clean as new content ships each week.



Social Media

Review & recycle

Assess engagement by account, time, and format, then feed top articles into the newsletter and YouTube.

Best-time tuning

Refine posting windows per audience from real performance data.

Spot the breakouts

Identify the posts that overperform and turn them into pillar content.

Measuring & aligning



Promotions & Advertising

Honest ROI review

Evaluate ad performance against the 3–5 GCS-clients-per-quarter goal and fund only what clears the bar.

Scale selectively

Increase spend only on proven audiences and creatives.



Marketing Assets

Internal comms engine

Develop a weekly internal newsletter on thought leadership and client experience to align the team.

Asset governance

Keep the library and voice current as the brand evolves. Schedule review 1x quarter min.



Events & Engagement

Run the numbers weekly

Hold the 30-minute review of leads, consults, proposals, and signed - with one accountable owner each.

Quarterly recalibration

Reset priorities each quarter based on what the data shows.



Email Marketing

Sharpen segmentation

Use AI to tag the 4–5K list by persona from LinkedIn, media, and internal data.

Lifecycle nurture

Refine sequences by where each contact sits in the journey. Analyze click rates, fall off, etc and update sequences where necessary.

Where AI keeps it sharp



AI visibility

Track AI visibility

Use OpenForge to watch AI visibility (already around 43 over 90 days) and domain authority.

Read site behavior (Hotjar)

Reconnect Hotjar to see where visitors click and what to fix next.



Content analytics

Find the winning articles

See which articles get the most organic traffic and feed those into the newsletter and LinkedIn.

Compound the content

Keep publishing so each AI ingestion of the web includes more of Equinox.



Internal comms

AI internal newsletter

Assemble the weekly internal update from an RSS feed tied to an AI task, with thought-leadership snippets.

Align the team on GCS

Use it to share the client experience and what a general counsel looks like, in Michelle's voice.



CRM & voice

Refine segmentation

Keep tags and segments current as the list grows and more personas are identified.

Update the opinion agent

Keep training the voice and opinion agent, or skill, on new content so it stays nuanced.

SECTION TWO

Creative Strategy

Three campaign concepts built for Equinox's voice - each one a content series that compounds across the channels above.



Stop Waiting for Your Next Legal Surprise

The AI-era risk series that makes Equinox the established voice - not a newcomer.

THE IDEA

Entrepreneurs are throwing lawsuits and confidential data into ChatGPT without knowing the consequences. Equinox already has credibility here - two visible speaking engagements and a real point of view on AI use policy and governance. This concept turns that into a recurring series: each piece answers a concrete AI-legal question businesses are actually Googling and asking AI, anchored by the brand's own line, "know what you don't know."

HOW IT SHOWS UP

- Pillar topic hub: "AI & the Law for Entrepreneurs" on the website
- Each question → blog + Michelle LinkedIn article + YouTube short + pin
- Repurpose existing speaking footage; pitch the POV to podcasts



What it achieves

- Thought leadership that wins share of voice vs. Deloitte & EY
- Positions Equinox as proactive and modern, not "old guys in suits"
- Drives organic GCS leads from owners worried about AI exposure



Equinox the Playing Field

The megacorp comparison engine that owns the pricing question buyers ask AI.

THE IDEA

Nobody in law is publishing pricing - yet that's exactly what buyers now ask AI. Equinox's brand already verbs itself ("Equinox the playing field") and centers on giving entrepreneurs the same advantages as the megacorps. This concept builds a content series around comparison and transparency: what a \$10M business actually pays for legal, fractional GC vs. hourly vs. in-house, and case studies with real numbers.

HOW IT SHOWS UP

- A pricing/tiers landing page (e.g. maintenance · growth · platinum)
- Comparison guides and "what legal really costs" case studies
- Routed to the BHA and segmented by Owner / CFO / HR audience



What it achieves

- Captures bottom-funnel pricing searches competitors ignore
- Can lift Equinox above big firms for "share of voice" in AI search
- Gives CFOs and owners the cost clarity that unblocks the decision

CREATIVE CONCEPT 03



The Smart BHA

Use AI to turn the Business Health Assessment into an interactive, data-rich front door.

THE IDEA

The Business Health Assessment already exists, but it's static and just sits on the site. This concept uses AI to make it a smart, interactive assessment - one that adapts to each visitor, gathers more relevant data, and hands Equinox a clear picture of the prospect before the first call. That makes pitching easier and wires every qualified lead straight into the pipeline, all human-reviewed.

HOW IT SHOWS UP

- An AI-driven assessment that adapts to each visitor and gathers more relevant data
- Qualified responses routed into Pipedrive and nurtured by persona
- Each profile packaged so Equinox can pitch faster, with the right context



What it achieves

- Builds the predictable pipeline that's the core goal
- Delivers warm, self-qualified leads with the context to pitch
- Lets one person run lead capture, routing, and nurture on autopilot

BONUS CONTENT

StoryBrand Assets for Your Site & Beyond!

Whether a quick introduction, or for the room that's ready to listen.

*We've Drafted Your BrandScript, Landing Page Copy,
and the Following Assets...(this copy is clickable)*

BONUS CONTENT

10 Headlines

Built in the Equinox voice - bold, plainspoken, entrepreneur-first.

- 1 Grow Your Business Without Growing Your Legal Anxiety
- 2 Experienced Legal Counsel Without the Full-Time Legal Department
- 3 Make Legal Support a Normal Part of Your Business
- 4 Protect What You've Built Before a Legal Problem Threatens It
- 5 Proactive Legal Guidance. Predictable Monthly Costs.

- 6 Stop Waiting for the Next Legal Surprise
- 7 The Legal Team Growing Businesses Can Lean On
- 8 Get the Legal Protection Your Business Has Grown Into
- 9 Legal Support That Keeps Pace With Your Business
- 10 Build Your Business With Greater Confidence and Fewer Surprises

BONUS CONTENT

10 Taglines

Short, repeatable lines for ads, social, and sign-offs.

1 Legal confidence for growing businesses.

2 Proactive protection. Predictable costs.

3 Your legal team for what comes next.

4 Grow confidently. We'll help protect the path.

5 Experienced legal counsel within reach.

6 Legal support that feels like part of the team.

7 Protect today. Prepare for tomorrow.

8 A stronger legal foundation for growth.

9 Fewer legal surprises. Greater peace of mind.

10 Practical legal guidance for ambitious entrepreneurs.

BONUS CONTENT

2 Short Elevator Pitches

Whether a quick introduction, or for the room that's ready to listen.



Growing a successful company brings bigger contracts, more employees, and greater legal risk. Unfortunately, traditional legal support can be expensive, reactive, and unpredictable. Equinox Business Law gives entrepreneurs access to experienced legal counsel at a predictable cost. We help strengthen contracts, employment documentation, business terms, and emerging protections before problems become emergencies. With Equinox as part of your team, you can feel protected, supported, and free to focus on growing your business.



You should not have to wait for a lawsuit, cybersecurity incident, unpaid invoice, or enormous legal bill to discover that your business is not fully protected. Equinox Business Law helps growing companies identify legal gaps and manage them proactively. From contracts and HR to licensing, AI liability, and cybersecurity concerns, we provide experienced, affordable support that feels like part of your team. Take the Business Legal Health Assessment or book a consultation to get started.

BONUS CONTENT

Medium Elevator Pitch

Whether a quick introduction, or for the room that's ready to listen.



Many entrepreneurs do not discover gaps in their legal protection until it is too late. A former employee brings a claim, a client refuses to pay, the business gets hacked, or an unexpected legal bill lands on the owner's desk. By then, the problem may already be expensive and disruptive. Equinox Business Law helps growing companies move from reactive legal crisis management to proactive legal confidence. We provide experienced, affordable counsel for contracts, employment matters, partnership and licensing agreements, client terms, cybersecurity, AI liability, and the other legal needs that emerge as a business grows. Our ongoing approach means someone is regularly paying attention, asking questions, and helping you address risks before they become emergencies. You get the support of a legal team without the cost of hiring in-house counsel or worrying about surprise fees. Book a consultation or take the Business Legal Health Assessment and begin building a stronger, safer foundation for your company's future.

BONUS CONTENT

Medium Elevator Pitch

Whether a quick introduction, or for the room that's ready to listen.



You have built a successful business, but as it grows, the legal questions become bigger and more frequent. Employee concerns, client contracts, licensing agreements, cybersecurity risks, and emerging AI liabilities can leave you wondering what your business may be missing. Traditional law firms are often expensive and reactive, while hiring full-time legal counsel may not make financial sense. Equinox Business Law gives growing companies access to experienced, proactive legal support at a predictable cost. We get to know your business, identify risks before they become expensive problems, and help put the right contracts, employment documents, terms, and protections in place. Instead of calling a lawyer only when something goes wrong, you gain a trusted legal partner who feels like part of your team. Take the Business Legal Health Assessment or book a consultation with Equinox. You can protect what you have built, prepare for what comes next, and lead your company with greater confidence and peace of mind.

Resources

Links for Later

Resources for Implementation

1

[Top 50 Blog Topics](#)

2

[12 Month Implementation Cal](#)

3

[StoryBrand Doc](#)

Implementation at a glance

Roughly two priorities per month so a lean team can execute well - anchored to the fall GCS cycle, then sustained.

Jul – Sep	Oct – Nov	Dec – Feb	Mar onward
PHASE 01 · Consolidate & Refresh	PHASE 02 · Engagement & Expansion	PHASE 03 · Optimization & Growth	PHASE 04 · Analytics & Refinement
• Website fixes + FGC landing page & pricing • Pipedrive stages, lead-source, weekly numbers • Newsletter re-intro + BHA front door	• Topic hubs + AI-assisted SEO content • Multi-account LinkedIn cadence + carousels • Site-visitor nurture automations; work EO/WPO/CFO rooms	• Pricing/comparison series + case studies • Targeted LinkedIn / Google / Meta ads test • Pinterest + YouTube; nurture à-la-carte buyers into GCS plans.	• Weekly leads, consults, proposals, and signed review, one owner each • Refine segmentation & tagging with AI • Internal comms engine; scale what works

LET'S GO BOLDLY

Building the engine, together.

You bring a strong brand and deep expertise. We bring the system, the AI tooling, and the cadence to turn it into a predictable pipeline - at a pace a lean team can sustain.

AI Smart Ventures

90-minute working session to follow.

