



THE MPF WEBINAR SERIES

What Every Managing Partner Needs to Know About Law Firm Marketing and Business Development

John Remsen, Jr. (Moderator)

President and CEO

Managing Partner Forum

James A. Durham

Managing Director

GrowthPlay

Adam C. Severson

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Baker Donelson

Jill S. Weber

Chief Marketing and Business Development Officer

Stinson Leonard Street

December 14, 2016

TheRemsenGroup

1020 Rosedale Road - Atlanta, GA - 30306
404.885.9100 - www.TheRemsenGroup.com

MPF WEBINAR

December 14, 2016 – 12:00-1:00pm ET

Title: **What Every Managing Partner Needs to Know
About Law Firm Marketing and Business Development**

Description: According to recent MPF surveys, marketing and business development are top of mind for managing partners of smaller and mid-size US law firms. More and more firms are hiring in-house marketing professionals, increasing their marketing and business development budgets and shifting resources toward business development, including sales training for lawyers, young and old.

What works? What doesn't? Where should smaller and mid-size law firms be investing their resources?

To answer these questions and more, we've invited three legends in law firm marketing (including two presidents of the Legal Marketing Association (LMA) to kick off our MPF Web Seminar Series. In this fast-paced, interactive session, we'll discuss these and other topics:

- Why Industry Focus is the Way to Go
- The Case for Individual Marketing Plans
- Sales Training for Lawyers and Staff
- The MPs Role in client Development
- What's Not on Most MP's Radar Screens that Should Be

We're proud to present this program in affiliation with the Legal Marketing Association.

Speakers: **John Remsen, Jr.** (Moderator)
President and CEO – Managing Partner Forum – Atlanta, GA

James Durham
Managing Director – GrowthPlay – Boston, MA

Adam Severson
Chief Marketing and Business Development Officer – Baker Donelson – Nashville, TN

Jill Weber
Chief Marketing and Business Development Officer – Stinson Leonard Street – Minneapolis, MN

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www.ManagingPartnerForum.org
Twitter: twitter.com/mpartnerforum
LinkedIn: linkedin.com/company/managing-partner-forum
YouTube: youtube.com/user/MPartnerForum

REV: October 26, 2016



BIOGRAPHICAL PROFILE

John Remsen, Jr. - President

John Remsen, Jr. is widely recognized as one of the country's leading authorities on law firm leadership, management, marketing and business development. After serving as in-house marketing director at two major law firms, John formed TheRemsenGroup, a consulting firm that works exclusively with law firms to help them develop and implement long-term strategic objectives to improve cohesiveness, performance and profitability. Since 1997, he has worked with over 350 law firms and thousands of lawyers. Most of his clients are mid-size commercial law firms, ranging in size from 15 to 200 lawyers.

John is a frequent speaker and author on law firm leadership and marketing topics. He has spoken at national, regional and local conferences of the American Bar Association, Association of Legal Administrators and Legal Marketing Association. He has also been a featured speaker at numerous state and local bar associations, and law firm networks. His articles have appeared in such well-respected publications as *ABA Journal*, *Asian Lawyer*, *Florida Bar News*, *For the Defense*, *Law 360*, *Law Practice Management*, *Law Practice Today*, *Lawyers Weekly*, *Legal Management*, *National Law Review*, *Marketing for Lawyers*, *Marketing the Law Firm*, *Managing Partner*, *New York Law Journal*, *Rainmaker's Review* and *Wisconsin Lawyer*.

In the late 1990's, John served on the national Board of Directors of the Legal Marketing Association (LMA) and was President of its Southeastern chapter for three years. Under his leadership, the chapter was recognized as LMA's Chapter of the Year in 2001. In addition, he was Executive Editor of *Strategies*, LMA's monthly newsletter. He also served on The Florida Bar's Standing Committee on Advertising for six years and was the only non-lawyer appointed to serve on its 2004 Advertising Task Force.

In 2001, TheRemsenGroup launched The Managing Partner Forum, the nation's richest source of information and the most highly acclaimed conference series for leaders of mid-size law firms. More than 1,100 managing partners from 850 law firms in 43 states have participated in 25 leadership conferences. Designed exclusively for law firm managing partners, the MPF has expanded from its original geographic base in Florida to present programs in Atlanta, Boston, Chicago, Dallas, Denver, Houston, Philadelphia, St. Louis and San Diego.

In 2007, John was appointed to serve as a core member of the ABA's Law Practice Management Section. In 2008, he was appointed to serve on the ABA's Education Board. Since then, he has contributed numerous articles to various ABA publications and has been a featured speaker at ABA meetings and conferences throughout the country.

In 2013, John was elected as a Fellow of the College of Law Practice Management in recognition of his 25 years of demonstrated expertise in law firm leadership and management. Founded in 1994, the College honors those who "inspire excellence and innovation in law practice management." Membership is by invitation only and includes just 200 individuals. In 2016, John was recognized by Lawdragon as one of the "Top 100 Consultants and Strategists" to the legal profession.

A native of West Palm Beach, Florida, John holds an MBA degree from The University of Virginia (1985) and a Bachelor's degree in Business Administration from the University of Florida (1980). Prior to attending graduate school, John was Executive Director of The Florida Council of 100, an organization consisting of Florida's top CEOs and business leaders.

November 2016



Jim Durham

Managing Director

Jim Durham is a veteran attorney who has worked with hundreds of professional service firms as a consultant and trainer, developing sales, marketing and management strategies designed to change the way lawyers and clients work together. Jim has been a consultant to several in-house legal departments and served as the Chief Marketing and Business Development Officer for three AmLaw100 firms. He was also General Counsel and VP of Marketing for Senior Tour Players, Inc., and the Sr. VP of Sponsorship for MLB Advanced Media (MLB.Com). He is the author of *The Essential Little Book of Great Lawyering*, and is co-editor and contributing author of the American Bar Association's book: *The Lawyer's Guide to Marketing Your Practice*. In 2010, Jim was inducted into the Legal Marketing Association Hall of Fame.

Jim is a dynamic keynote speaker, and an engaging trainer and coach. He now provides strategic consulting, coaching, and training to GrowthPlay's legal and other professional services clients.

Jim received his bachelor's degree from Harvard College and his law degree from Emory University School of Law. He has also participated in Executive Education programs at both the Kellogg School and the Harvard Law School.

***Adam C. Severson**



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Adam Severson is the Chief Marketing and Business Development Officer at Baker Donelson. He is responsible for the strategic direction and execution of the Firm's business development and marketing initiatives, and collaborates with the Firm's lawyers and professional staff to maintain a client focus, increase marketplace awareness and facilitate cross-office and cross-practice collaboration. Mr. Severson sets direction for practice group- and industry-driven strategies, public relations, client interviews, brand management, advertising, competitive intelligence and market research. He is a nationally-recognized presenter and leader in the legal marketing and business development community.

Prior to joining Baker Donelson, he held similar roles as Director of Business Development and Marketing at Faegre & Benson LLP and Director of Business Development at Dorsey & Whitney. Mr. Severson also spent more than six years with the Thomson Corporation (now Thomson Reuters) serving in various sales capacities, focusing on ensuring that firms' business development and marketing efforts were aligned with their clients' interests.

In addition to his professional responsibilities, Mr. Severson is involved in numerous community activities and volunteers with Habitat for Humanity and Goodwill Easter Seals. Prior to moving to Nashville, he dedicated time to Minnesota's Twin Cities RISE! and Twin Cities Diversity in Practice.

Professional Honors & Activities

- Past President – The International Legal Marketing Association, the largest professional organization in the world dedicated to the advancement of the legal marketing and business development profession comprised of more than 3,000 members in more than 15 countries
- Named – "CMO of the Year" by the *Nashville Business Journal* (2013)
- Co-Chair – 21st Annual Law Firm Marketing Partner Forum, Naples, Florida (2014)
- First Place recognition by LMA Southeast Chapter "Your Honor Awards," Practice Development Category, for 2013 Key Client Initiative
- Second Place recognition by LMA National "Your Honor Awards," Newsletter or Alert, for 2013 Entrepreneur Minute alert series
- Third Place recognition by LMA National "Your Honor Awards," Social/Interactive Media for Pig Skin Pick'em League
- Honorable Mention recognition by LMA National "Your Honor Awards," Marketing on a Shoestring, for 2013 Baker5 program
- Named – "Top 200 Private Company Marketing Executive" by ExecRank, which recognizes leaders in the field from over 15,000 eligible executives (2012)
- Leader of team recognized as the #1 Business Development & Marketing team while at Baker, Donelson, Bearman, Caldwell & Berkowitz, PC, by *Marketing the Law Firm*, an American Lawyer Media publication, in their 8th Annual "MLF 50" report (2012)
- Legal Marketing Association (LMA) – Orlando Annual Conference Committee co-chair (2011); International Board of Directors member at large (2008 – 2009) and secretary (2007); Minnesota Chapter president (2006)

- Leader of team recognized as the #1 Business Development & Marketing team (shared designation) while at Faegre & Benson LLP, by *Marketing the Law Firm*, an American Lawyer Media publication, in their 6th Annual "MLF 50" report (2010)
- Recognized – "Best of Industry" for Outstanding Achievement in Web Development by the Web Marketing Association
- First Place recognition by LMA Minnesota Chapter "Your Honor Awards," Event category, for 2010 Food, Agriculture & Biofuels National Conference
- Third Place recognition by LMA National Chapter "Your Honor Awards," Event category, for 2010 Food, Agriculture & Biofuels National Conference

Publications & Speaking Engagements

- "Communicating in the Moment," Legal Marketing Association Southeastern Annual Conference, Orlando, Florida (September 2016)
- "Understanding the Essential Elements of Growth," Thomson Reuters webinar (September 2016)
- "Adding Value by Getting Specific: How You Can Dig Deeper to Become a Trusted Advisor," Legal Marketing Association Southern California Chapter, San Diego, California and Irvine, California (August, 2016)
- "Adding Value by Getting Specific: How You Can Dig Deeper to Become a Trusted Advisor," Legal Marketing Association Capital Chapter, Washington, D.C. (May 2016)
- "Strategic Planning Requires Strategic Implementation," Legal Marketing Association Los Angeles Chapter, Continuing Marketing Education (CME) Annual Conference, Los Angeles, California (November 2015)
- "Making the Perfect Pitch," Managing Partners Program, Terralex Global Meeting, Nashville, Tennessee (November 2015)
- "The Evolving Role of a Legal Marketer," Legal Marketing Association Rocky Mountain Chapter, Denver, Colorado (November 2015)
- "Voice of the Client," Panel Moderator, Legal Marketing Association Southeastern Annual Conference, Atlanta, Georgia (September 2015)
- "Perspectives from the Top," Legal Marketing Association Metro NY Chapter, Future Leaders Program, New York, New York (August 2015)
- "The Business of Being a Lawyer," University of Florida School of Law, Gainesville, Florida (August 2015)
- "Strategic Planning Requires Strategic Implementation," Legal Marketing Association Metro Philly Annual Conference, Philadelphia, Pennsylvania (July 2015)
- "CMO Panel, Marketers Driving Change," moderator, Legal Marketing Association, Nashville City Group, Nashville, Tennessee (July 2015)
- "Pitch Best Practices," TerraLex Global Meeting, Munich, Germany (June 2015)
- Presidential Opening Remarks, Legal Marketing Association Annual Conference, San Diego, California (April 2015)
- Your Honor Awards Emcee, Legal Marketing Association New England Chapter, Boston, Massachusetts (March 2015)
- "Strategic Planning Requires Strategic Implementation," Professional Services Marketing Association, Pittsburgh, Pennsylvania (October 2014)
- "In-House Counsel Panel: In Their Own Words," moderator, Legal Marketing Association Southeastern Regional Conference, Nashville, Tennessee (October 17, 2014)
- "**Business Development: Mining Your Network**," podcast, ABA Section of Litigation's Sound Advice Series (June 2014)
- "Creating the 'Experience Economy' in Law Firms," panelist, 21st Annual Marketing Partner Forum, Naples, Florida (January 2014)
- "Strategic Planning Requires Strategic Implementation," 2013 Ohio Legal Practice Development Institute, Columbus, Ohio (October 2013)
- "Marketing & Business Development Continuum," LMA Southeast Annual Conference, QuickStart

Program, Charleston, South Carolina (October 2013)

- "In-House Counsel Panel: In Their Own Words," Moderator, LMA Southeast Annual Conference, Charleston, South Carolina (October 2013)
- "Competitive Landscape: Redefining Legal Services," Terralex Global Meeting, Paris, France (September 2013)
- "Winning in Marketing," Panelist, *Nashville Business Journal* CMO Panel, Nashville, Tennessee (August 2013)
- "Action Planning," Terralex Global Meeting, New Orleans, Louisiana (May 2013)
- "Friendly Competition Sets One AmLaw200 Firm Apart," *Strategies: The Journal of Legal Marketing* (March/April 2013)
- "Law Firm Video – Director's Cut," 2013 LMA Annual Conference, Las Vegas (April 10, 2013)
- "360° View of Key Client Programs and Cross-Selling," Marketing Partner Forum, Rancho Palos Verdes, California (January 2013)
- "One Size Fits One," *Law Practice Management* magazine (January/February 2013)
- "Using Video to Market Legal Services," Legal Marketing Association Webinar (September 2012)
- "Client Teams Rule/Client Teams Suck," Legal Sales and Service Organization RainDance Conference, Chicago, Illinois (June 6, 2012)
- Chief Marketing Officer Panel, Legal Marketing Association, Birmingham City Group, Birmingham, Alabama (April 26, 2012)
- "The Evolution of the Marketing Budget: From Expense to Strategic Investments," *PM* magazine (Spring 2012)
- "The Voice of the Client: Incorporating Your Client Into Your Business Development Initiatives," American Lawyer Media Law Firm Marketing & Business Development Leadership Forum, New York (May 2011)
- "Use of Social Media for International Business," Finnish American Chamber of Commerce, Minneapolis (February 2011)
- "Social Media's Impact on IT & Marketing," Twin Cities Business Journal Event, Minneapolis (November 2010)
- Interactive Marketing, Guest Lecturer, University of St. Thomas, MBA Program (November 2010)
- "Translating Competitive Intelligence into Revenue," Ark Group Competitive Intelligence in the Modern Law Firm, New York (June 2010)
- "Creating and Implementing a Sales and Business Development Culture in Your Firm," West LegalEdCenter, Hildebrandt webinar (March 2010)
- QuickStart Presenter, Legal Marketing Association Annual Conference, Denver (March 2010)
- "Business Development: Shifting the Organizational Model for Results," V-Panel (December 2009)
- "Business Development Panel: In-House Marketers Share How They Do It," LMA Webinar (July 2009)
- LMA Annual Conference M.O.R.E. Session Facilitator, Los Angeles (March 2008) and Washington, D.C. (April 2009)
- Minnesota LMA Chapter Program, Minneapolis (November and April, 2007)
- "Integrating Business Development & Marketing," Minnesota State Bar Convention, Brainerd (June 2006)
- "Competitive Intelligence," Hildebrandt International: Practice Group Management Conference, New York (May 2006)
- "Best Practices for Law Firm Management," ARK Conference, Miami (January 2006)
- "Law Firm Sales: Tactics and Best Practices," IOMA Audio Conference (September 2005)
- "Integrating Business Development & Marketing Bay Area," LMA Chapter Presentation, San Francisco (February 2005)
- "Integrating Business Development & Marketing," National LMA Conference, Phoenix (April 2005)
- Law Firm Chief Marketing Officer's Forum, Washington, D.C. (December 2004)

- Southeast LMA Annual Conference, Nashville, Tennessee (September 2004)

Education

- University of Minnesota-Duluth, B.A.

EXPAND YOUR EXPECTATIONS

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JILL S. WEBER

Chief Marketing and Business Development Officer

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Jill Weber is Chief Marketing and Business Development Officer for Stinson Leonard Street, where she is responsible for creating and executing marketing and business development strategies, including Fast Forward®, a nationally recognized integrated business development initiative. Jill was named to the *National Law Journal's* inaugural list of 50 Business of Law Trailblazers & Pioneers; is a Fellow in the College of Law Practice Management; was recognized as a 2009 "Unsung Legal Hero" by *Minnesota Lawyer*; was the recipient of the 2007 EXCEL Minnesota Award, sponsored by the Minnesota Chapter of the International Association of Business Communicators; and has received three national and 15 local Legal Marketing Association (LMA) "Your Honor" awards. She is the President-Elect of LMA.

Jill offers more than 20 years of experience creating marketing and business development strategies for professional service firms, including law firms, accounting firms and financial institutions. Her experience includes strategic and tactical planning, business development training and coaching, merger integration and communications, lateral integration, client service training, client interviews, branding, media relations, social media and advertising. Jill successfully led the marketing communications strategy for the Stinson Leonard Street merger and is actively involved in ongoing integration and client growth strategies. She oversees a staff of 16 business development, marketing, communications, event planning and marketing technology professionals.

Prior to joining Stinson Leonard Street, Jill served as Director of Account Services for a marketing communications agency. She also served in lead marketing roles with two other law firms, Fredrikson & Byron in Minneapolis and McDermott, Will & Emery in Chicago, and with Deloitte & Touche's Management Consulting practice in Chicago.

Jill is a regular speaker on marketing and business development, and is the author of numerous articles on professional services marketing

EDUCATION

- University of Minnesota, B.A., Journalism

MPF Webinar

What Every Managing Partner Needs to Know



Managing Partner Forum
WEBINAR
SERIES

TheRemsenGroup
Smart Strategies for the Forward-Thinking Law Firm

**What Every Managing Partner Needs to Know
about Law Firm Marketing and Business Development**

December 14, 2016

The slide features a white background with a green and yellow wavy graphic at the bottom. The text is centered and uses a mix of bold and regular fonts.



Managing Partner Forum
WEBINAR
SERIES

TheRemsenGroup
Smart Strategies for the Forward-Thinking Law Firm

Welcome to Today's Session
Daelyn Fortney, TheRemsenGroup

Law Firm Marketing and Business Development

LEGAL MARKETING ASSOCIATION
LMA

What works? What doesn't?
Where should smaller and mid-size law firms be investing their resources?
In this fast-paced, interactive session, we'll discuss these and other topics:

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MPF Webinar

What Every Managing Partner Needs to Know

**John Remsen, Jr.**
President, TheRemsenGroup
President & CEO, Managing Partner Forum

Consultant Strategic Planning, Firm Retreats, COO/CMO Searches
More than 350 law firms since 1997

Previous Gunster, Porter Wright

Speaker American Bar Association, Association of Legal Administrators,
Legal Marketing Association, MPF Annual Conference, Law
Firm Networks

Education MBA – University of Virginia
BSBA – University of Florida

**James A. Durham**
Managing Director, GrowthPlay

Previous Littler, McGuire Woods, Ropes & Gray

Affiliations ABA's Law Practice Division
Legal Marketing Association

Recognition Legal Marketing Association, Hall of Fame - 2010

Education JD – Emory University School of Law
BA – Harvard College

MPF Webinar

What Every Managing Partner Needs to Know

**Adam C. Severson**
Chief Marketing and Business Development Officer
Baker Donelson

Previous Faegre & Benson, Dorsey & Whitney

Affiliation Past President, Legal Marketing Association

Speaker Legal Marketing Association, Thomson Reuters, TerraLex, University of Florida School of Law, Legal Marketing Association, Professional Services Marketing Association

Education BA – University of Minnesota-Duluth

**Jill S. Weber**
Chief Marketing & Business Development Officer
Stinson Leonard Street

Previous Mackenzie Marketing, Fredrickson & Byron

Affiliations Creator, Fast Forward®
President-Elect, Legal Marketing Association

Honors *National Law Journal* – “Legal Business Trailblazers & Pioneers”
MLF 50 – Top Law Firms in Marketing and Business Development
2009 Minnesota Lawyer – “Unsung Legal Heroes” Award

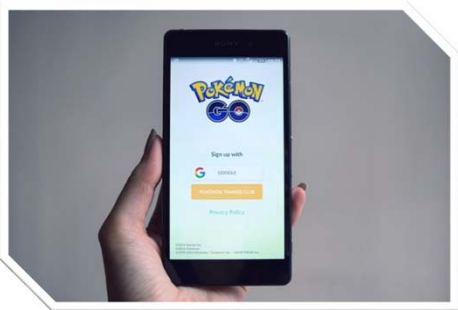
Education BA – University of Minnesota-Twin Cities

MPF Webinar

What Every Managing Partner Needs to Know

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TheRemsenGroup
Smart Strategists for the Forward-Thinking Law Firm



Major Trends

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Time & Money

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A photograph of several white LEGO Stormtrooper minifigures standing in a line on a dark surface. The figures are arranged in a perspective that makes them appear to be marching or standing in formation.

Individual Marketing Plans

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A photograph of a tabby cat sitting at a desk, looking intently at a silver laptop. The cat is positioned as if it is working or observing the laptop screen.

Sales Training

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Wasting Time & Money

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MP's Role in Client Development

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What Every Managing Partner Needs to Know



Additional Resources

Greentarget/Zeughauser Group's
2015 State of Digital & Content Marketing Survey
<http://www.digitalandcontentsurvey.com/registration/>

Harvard Law School's "The Practice"
<https://thepractice.law.harvard.edu/article/past-present-future/>

Foley's GRS Product
<https://www.foley.com/grs/>

Akerman's Data Law Center
<http://www.akerman.com/documents/res.asp?id=2483>



Thanks to Our Panel

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**Adam C. Severson**
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**Jill S. Weber**
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MPF Webinar

What Every Managing Partner Needs to Know



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MARKETING THE LAW FIRM

NOVEMBER 2016

Moving from Good Law to Great Law™

By James A. Durham

Law firm leadership is at a proverbial fork in the road. The people running law firms can continue to do business as usual, or they can lead their firms toward a model of business that reflects the new and still evolving client expectations and market demands. (Much has been written about the challenges of relying on lateral acquisitions for growth, but that is a game that will always be played, so I will stick to a review of broader leadership and operations issues.)

Business as usual means trying to squeeze modest growth out of reduced expenses, increased billable hours, and hourly rate increases. That is how it has always been done, right? But think about this. Everything that clients are telling us, and every market trend is confirming, that law firms cannot count on more hours and higher rates for long-term growth. The business as usual strategy is out of alignment with client preferences and the clear shift is to use value as the primary driver of client satisfaction. For some law firm leaders, modest short-term growth is fine. It might get them through the balance of their term as managing partner, or, in some cases, sustain the firm long enough for them to retire. Bold leaders need to do more.

The word “innovation” can sound intimidating, so we suggest that law firm leaders think about it as moving from good law to *Great Law*. It is not enough to be a forward-looking leader in the current environment, it is critical to be forward-acting; that means being committed to modifying compensation systems, improving talent acquisition and development throughout the organization, and recognizing lawyers for making important contributions beyond the delivery of legal services (recruiting, account management, sales, mentoring, etc.). Great Law means investing in training, coaching, and technology to support client service excellence, revenue generation, and legal project management skills.

This forward-acting approach might seem radical, but the evidence of a shrinking, hyper-competitive market is overwhelming. Millions of dollars are being invested in businesses that offer alternative legal services, clients are bringing work in-house, and many firms are getting serious about winning and keeping clients. If your firm is not, it could be left behind. And, it is important to note that the need for visionary leadership is size agnostic (immaterial?) — Great Law is not just the province of Big Law. The need to be more strategic, make investments and operational improvements exists equally in the smaller and middle-market firms. Great Law is also authentic.

Well-managed, forward-acting firms will experience the benefits of a Triple Bottom Line (TBL), an approach introduced in 1994 by John Elkington, which measures financial profit and the value created for people and the planet. In a law firm context, a TBL can be measured by three standards:

- Is your law firm the preferred place for the most profitable clients to do business?
- Is your law firm the preferred place for the most talented people to work?
- Is your law firm the preferred place where the most inspired leaders want to serve their communities?

Legal marketers can play a pivotal role in this transformation process. If you are familiar with the book *Watership Down*, you know that a group of rabbits were saved from the excavation of their warren because one of the group, Fiver, had the foresight to see the danger that lurked in the future. Seeing patterns in the environment around him, and using his strong intuition, he led a number of his colleagues on a journey to a safer place — the trip was not without risk or peril, but it was necessary for survival. Legal marketers can play that role. To help your firms achieve long-term success:

- Develop and recommend programs that bring the voice of the client into your firms — let them tell you where you need to be to serve them in the future. Recommend and lead client feedback programs.
- Bring market data to the attention of management. Insure that leaders are aware of the mismatch between business as usual and the new marketplace. Become a student of innovation — not just in the legal profession, but in the corporate and start-up worlds, as well.
- Suggest that the firm use a new set of metrics and key performance indicators (KPIs). It has been said many times that “what gets measured, gets done.” Recommend new accountabilities and KPIs (in addition to client satisfaction), both financial and human. Are key clients growing or declining in revenue? Are there patterns of lawyer attrition that might suggest disillusionment with the current strategy?
- Are you using every available metric to find how clients are finding your firm, using you lawyers, buying legal services generally, as well as how your competitors are threatening and possibly displacing your firm and brand? Big Data is no longer a futuristic concept — it is a competitive necessity. There are a number of talent analytics that you can apply throughout the firm to identify those with special skills and those who need training.

Insist to firm leadership that the lawyers and staff have the right service skills to create Superfans among clients, and that the lawyers have the sales skills to attract and grow clients. Legal marketers are in the best position to recommend training and coaching programs that improve critical skills.

Conclusion

Legal marketing professionals can be the leading force in the move to Great Law. Fiver was not a strong personality, nor was he one of the powerful leaders. But he could see the future in ways that others did not, and he refused to sit by silently with a dangerous future looming. Show your firm the path to long-term success. And never give up on greatness, it is a matter of conscious choice and discipline.

Jim Durham is a Managing Director with GrowthPlay, which helps firms and companies build growth with a more efficient sales force and business development strategy. Jim has served as the CMO of three national law firms. He may be reached at jdurham@growthplay.com.

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NEWSLETTERS

Marketing

The Law Firm®

An **ALM** Publication

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LEADERSHIP

Moving from Good Law to Great Law™

By James A. Durham

Law firm leadership is at a proverbial fork in the road. The people running law firms can continue to do business as usual, or they can lead their firms toward a model of business that reflects the new and still evolving client expectations and market demands. (Much has been written about the challenges of relying on lateral acquisitions for growth, but that is a game that will always be played, so I will stick to a review of broader leadership and operations issues.)

Business as usual means trying to squeeze modest growth out of reduced expenses, increased billable hours, and hourly rate increases. That is how it has always been done, right? But think about this. Everything that clients are telling us, and every market trend is confirming, that law firms cannot count on more hours and higher rates for long-term growth. The business as usual strategy is out of alignment with client preferences and the clear shift is to use *value* as the primary driver of client satisfaction. For some law firm leaders, modest short-term growth is fine. It might get them through the balance of their term as managing partner,

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Essential Qualities of Successful Rainmakers

By Cynthia Sharp

Although a handful of law firms has hired non-lawyer sales teams, most still rely upon individual attorneys or practice groups to generate new client matters (*i.e.*, to sell) even though the majority of them have never received business development skills training.

My purpose in writing this article is to describe some of the important characteristics and habits shared by attorneys who have built successful practices. The perspectives are based upon my 37 years of experience in the legal services arena — 30 as the managing partner of my own small firm and seven as a business development leader.

Readers whose work responsibilities include formal or informal coaching of firm lawyers may wish to distribute this article to their protégés or to discuss some of the concepts during the course of future coaching conversations.

MINDSET

Some lawyers do not pursue business development activities and conversations because they do not think it is their role. Others are simply untrained, uncomfortable with the process and don't know where to begin. Also, sales can be perceived as a "dirty" word by professionals whose experience with high-pressure retail salesmen has been less than appealing or comfortable.

Needless to say, high-pressure tactics have no place in the professional environment. The mindset of successful lawyers is to *influence* their clients to behave in their best legal interest by retaining them to help prevent or solve their problems. Ascending to that position of influence requires an investment in developing a trusted relationship.

When legal stakes are high, relationships usually take longer to ripen which is why building the client pipeline takes significant discipline. Since the results may not come quickly, the impatient attorney faced with a lengthy relationship-building process may give up out of frustration and lose the opportunity to "ask for

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Media & Comm

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for consumers, retailers, utilities and consumer goods companies? b) How are businesses addressing privacy and security issues? c) What do technology-driven productivity gains mean for employees: layoffs or opportunities for more tech-savvy candidates?

Technology affects seemingly every aspect of business operations; protecting precious data and anticipating cyber threats are priorities in all industries. Reiterate that your practice is on top of these concerns and the firm offers resources to resolve privacy, security and related technology issues.

7. Litigation and settlement: a) What were the largest cases of the year? b) How will those decisions or judgements impact future litigation?

These precedents will resonate for several years; accordingly, companies may adopt pre-emptive defenses to avoid or mitigate similar litigation and settlement.

8. The Big Picture: a) What other issues loom on the horizon that

companies should address to make this year the best in recent memory? b) Which unsung players are likely to appear?

A surging economy, an uptick in consumer confidence and a smooth electoral transition will cascade across many sectors. On the other hand, a wild card company or circumstance that does not fit the pattern may emerge, such as a natural disaster, fluctuations in currency or a spike in the price of oil that can cause automobile sales to plummet. Other flare-ups include domestic labor unrest or political upheaval overseas. Consider the likelihood of selected events and their respective repercussions.

CREATE A CONTEXT

As your colleagues develop answers to these general issues, create a context and frame their responses as upcoming trends, without sticking your neck out, if at all. These substantive predictions will address: 1) What might happen; 2) The factors pointing in that direction; 3) How market participants and/or clients might capitalize on these trends.

SPICE IT UP

Use rhyme, alliteration, visual imagery or anecdotes to transform these insights into quotable phrases. (See “Maximize Client Alerts,” *Marketing the Law Firm*, February 2014, available at <http://bit.ly/2fcrfHM>). NOW is the moment to present Top Seven Predictions for the Name of Industry in 2017 to reporters and editors at appropriate business and trade publications, ahead of the compilation of the typical year-end article.

In December 2017, it is unlikely that any journalist will check back to confirm how closely these predictions hit the target. But reporters will remember who their sources were for the trend story, so they may well ask for an update to prepare for 2018.

Journalists — and clients — contact the attorneys they have heard of and read about. It’s up to you to position your partners as thought leaders with powerful insights, gleaned from close observation of market trends, and thereby help make their phones ring.



Leadership

continued from page 1

or, in some cases, sustain the firm long enough for them to retire. Bold leaders need to do more.

The word “innovation” can sound intimidating, so we suggest that law firm leaders think about it as moving from good law to *Great Law*. It is not enough to be a forward-looking leader in the current environment, it is critical to be forward-acting; that means being committed to modifying compensation systems, improving talent acquisition and development throughout the organization,

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and recognizing lawyers for making important contributions beyond the delivery of legal services (recruiting, account management, sales, mentoring, etc.). Great Law means investing in training, coaching, and technology to support client service excellence, revenue generation, and legal project management skills.

This forward-acting approach might seem radical, but the evidence of a shrinking, hyper-competitive market is overwhelming. Millions of dollars are being invested in businesses that offer alternative legal services, clients are bringing work in-house, and many firms are getting serious about winning and keeping clients. If your firm is not, it could be left behind. And, it is important to note that the need for visionary leadership is size agnostic (immaterial?) — Great Law is not just the province of Big Law. The need to be more strategic, make investments and operational

improvements exists equally in the smaller and middle-market firms. Great Law is also authentic.

Well-managed, forward-acting firms will experience the benefits of a Triple Bottom Line (TBL), an approach introduced in 1994 by John Elkington, which measures financial profit and the value created for people and the planet. In a law firm context, a TBL can be measured by three standards:

- Is your law firm the preferred place for the most profitable clients to do business?
- Is your law firm the preferred place for the most talented people to work?
- Is your law firm the preferred place where the most inspired leaders want to serve their communities?

Legal marketers can play a pivotal role in this transformation process. If you are familiar with the book

continued on page 8

Leadership

continued from page 6

Watership Down, you know that a group of rabbits were saved from the excavation of their warren because one of the group, Fiver, had the foresight to see the danger that lurked in the future. Seeing patterns in the environment around him, and using his strong intuition, he led a number of his colleagues on a journey to a safer place — the trip was not without risk or peril, but it was necessary for survival. Legal marketers can play that role. To help your firms achieve long-term success:

- Develop and recommend programs that bring the voice of the client into your firms — let them tell you where you need to be to serve them in the future. Recommend and lead client feedback programs.
- Bring market data to the attention of management. Insure that leaders are aware of the mismatch between business as usual and the new

marketplace. Become a student of innovation — not just in the legal profession, but in the corporate and start-up worlds, as well.

- Suggest that the firm use a new set of metrics and key performance indicators (KPIs). It has been said many times that “what gets measured, gets done.” Recommend new accountabilities and KPIs (in addition to client satisfaction), both financial and human. Are key clients growing or declining in revenue? Are there patterns of lawyer attrition that might suggest disillusionment with the current strategy?
- Are you using every available metric to find how clients are finding your firm, using you lawyers, buying legal services generally, as well as how your competitors are threatening and possibly displacing your firm and brand? Big Data is no longer a futuristic concept — it is a competitive necessity.

There are a number of talent analytics that you can apply throughout the firm to identify those with special skills and those who need training.

Insist to firm leadership that the lawyers and staff have the right service skills to create Superfans among clients, and that the lawyers have the sales skills to attract and grow clients. Legal marketers are in the best position to recommend training and coaching programs that improve critical skills.

CONCLUSION

Legal marketing professionals can be the leading force in the move to Great Law. Fiver was not a strong personality, nor was he one of the powerful leaders. But he could see the future in ways that others did not, and he refused to sit by silently with a dangerous future looming. Show your firm the path to long-term success. And never give up on greatness, it is a matter of conscious choice and discipline.

—❖—

Rainmakers

continued from page 4

a special needs trust was a “no brainer.” Insulted at the person’s insensitivity, the mother of the child walked out of the room and it took close to an hour for her to agree to resume the meeting.

PERSISTENCE AND RESILIENCE

If the lawyer is not retained at the end of a consultation, the following wrap-up questions can be productive as a means of continuing the questions: 1) What additional information do you need in order to make the decision as to whether to move forward? 2) What is your time frame for making a decision? 3) Is it all right if I call you in “X” weeks to see where you stand in your decision making?

By all means, make sure that a system is implemented so that the attorney actually follows up.

Fear of rejection prevents many talented attorneys from pursuing lucrative opportunities. If we don’t ask for business, we don’t run the risk of hearing that ego deflating word: “No.” People with resilient attitudes can bounce back quickly in the face of an adverse situation. Fortunately, resilience can be learned through experience along with a healthy dose of self-talk.

Example: When told that an attorney’s services are not needed, the first thought should be: “The potential client doesn’t mean ‘No,’ she just means ‘Not yet.’ Instead of feeling rejected, the attorney could feel curious as to why the client decided to go a different direction.

Three years ago, I was invited to submit a proposal for a matter in

the center of my wheelhouse. When someone else was retained, I e-mailed the GC and requested a conversation to discuss the reasons for my rejection. This led to a strong value conversation, which led to a significant contract within a few months.

CONCLUSION

Almost every motivated lawyer can build his or her book of business by shifting mindset, improving the qualities outlined herein, and taking consistent steps in implementing a strategic plan. Sometimes, they simply need guidance along the way.

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A Lawyer's Most Powerful Business Plan

Posted by [Jim Durham](#) on Dec 5, 2016 2:24:05 PM



If I have learned one thing in my experience as a lawyer, consultant, and trainer, it is that lawyers typically have serious misconceptions about how they should “sell” legal services.

They think of business development as an unseemly proposition; they see it as an exercise in which they *push* themselves and their firms on people who don’t need or want what they have to offer.

If that were an accurate description of how you should *sell* legal services, I would not want any part of it either. Fortunately, that approach is just plain wrong.

Moreover, most lawyers want to believe that *just being a great lawyer is enough to help them achieve all of their business development goals*. I actually agree with the maxim that **being a great lawyer IS the best business development plan**.

The problem with this approach, however, is that *lawyers* want to define "great lawyers" in terms they understand, when what really matters is how *clients* define "great lawyers".

Being a great lawyer always leads to client loyalty, client growth, and referrals — which means new business.

Put another way, my work has revealed that the most important qualities of successful lawyers relate to service and attitude; the quality of their drafting or their negotiating skills are not sufficient to distinguish great lawyers from everyone else.

Don’t get me wrong, many rainmakers are *also* seen as great technical or procedural lawyers. But almost all lawyers are good at the law. Lawyers are overwhelmingly viewed as *great* by clients *for other reasons*, like providing real value beyond billable hours and operating with a

client-centered focus. Unfortunately, these qualities weren't taught in law school or in the early years of our careers as lawyers, however it is often these traits that turn solid process lawyers into the most successful and lauded attorneys. The key is to shift your mindset from gaining business to one of authentic relationship building. Rethink the way you deliver value to the clients you serve.



2015
STATE OF DIGITAL
- & -
CONTENT MARKETING
SURVEY

State of Digital & Content Marketing Survey 2015

Law firms are producing lots of content, and they intend to produce a lot more. But will anybody read it? That's the crucial question raised by results of the 2015 State of Digital & Content Marketing Survey, which shows that while firms are producing content in increasing quantities, they may be neglecting the quality of what they're producing. The survey results also raise serious, related questions about whether firms are taking adequate strategic steps to support their investments in content.

In-House Counsel

- 5th generation of inaugural 2010 survey
- 167 in-house respondents (GCs, Deputy GCs, etc.)
- How are you using social? What content do you value most?

Law Firm CMOs/Marketers

- 2nd year of law firm CMO/Marketer survey
- 81 law firm CMO/Marketer responses (top 350 firms)
- How are you managing content at your firms?

HIGHLIGHTS

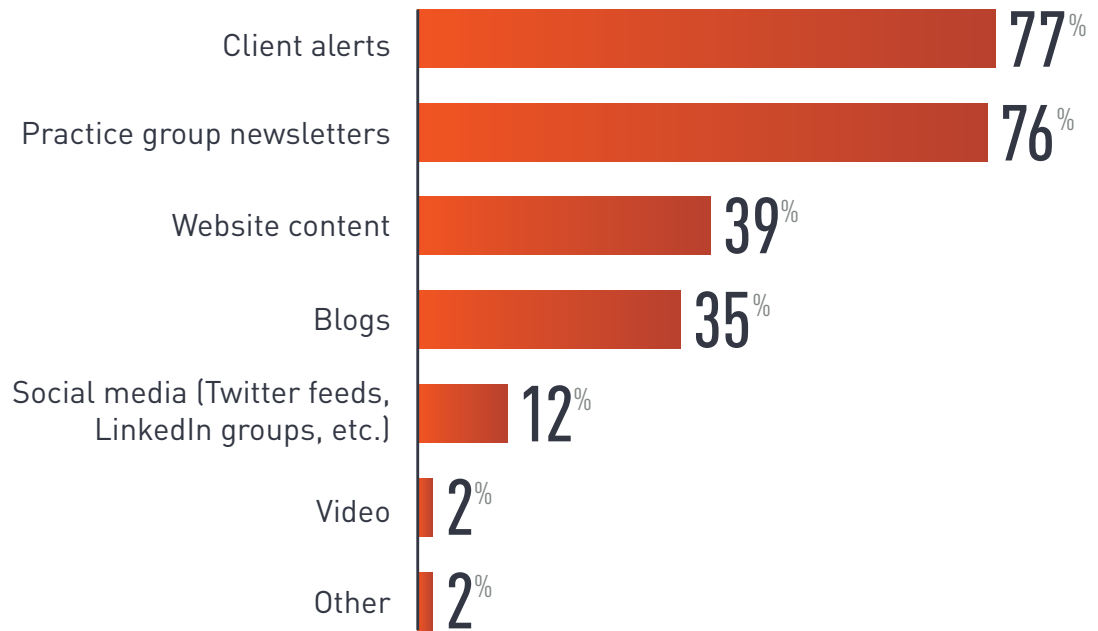
2015 Survey Highlights

- The percentage of in-house counsel who read blogs regularly has plateaued since 2014, as has the percentage of in-house counsel who ranked blogs as the most valuable law-firm-generated content.
- In a related finding, it seems that nearly a third of in-house lawyers aren't reading firm blogs, period. We asked how often in-house counsel visit different types of blogs — from law-firm-attorney-authored blogs to industry-focused blogs from other sources. In every case, at least 30 percent of in-house counsel said they don't visit those blogs at all.
- The importance of blogs in influencing hiring decisions also fell slightly. Only 38 percent of respondents said they could envision a future in which a high-profile blog would influence them to hire a firm — down from 50 percent in 2014 and 55 percent in 2012.
- Most noteworthy, the percentage of in-house counsel who rate firm blogs as somewhat or very credible fell significantly — from 75 percent last year to 65 percent this year.
- But, curiously, 74 percent of in-house counsel still said they find law-firm blogs valuable.

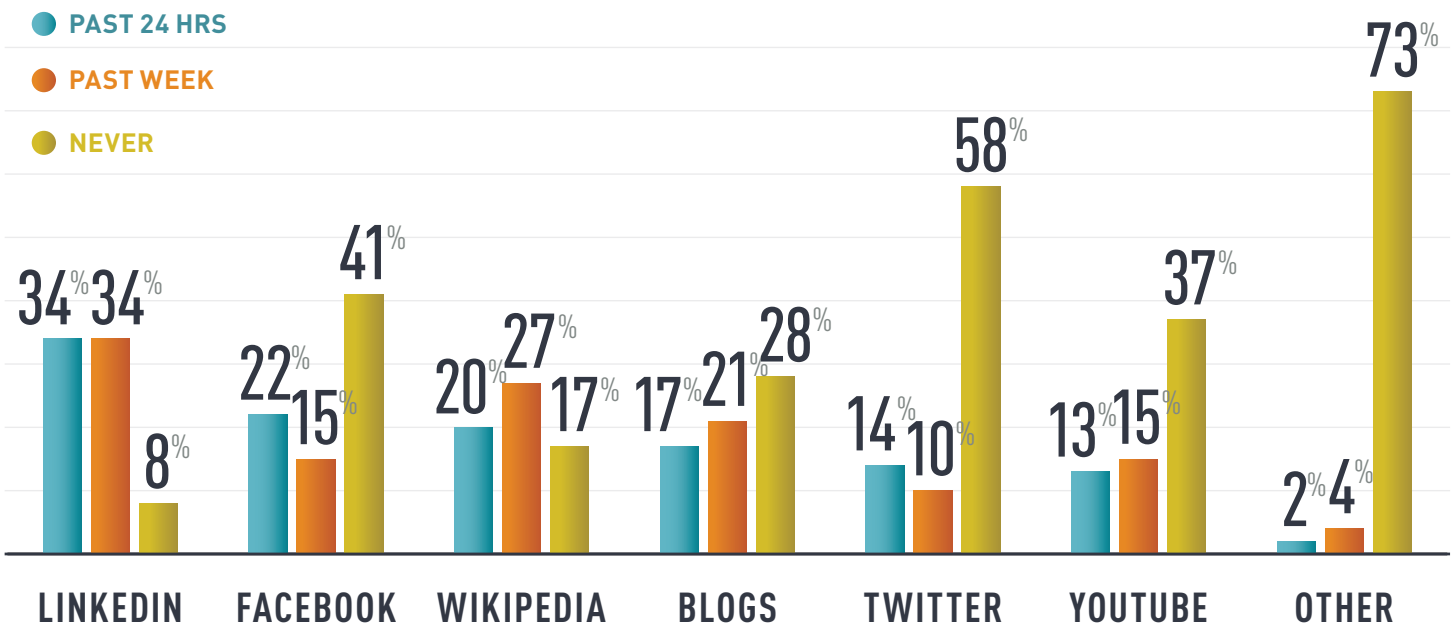
What follows are some key highlights from this year's report. The full results of the survey are available for purchase at www.digitalandcontentsurvey.com

IN-HOUSE COUNSEL SURVEY

What types of law-firm-generated content do you find most valuable?



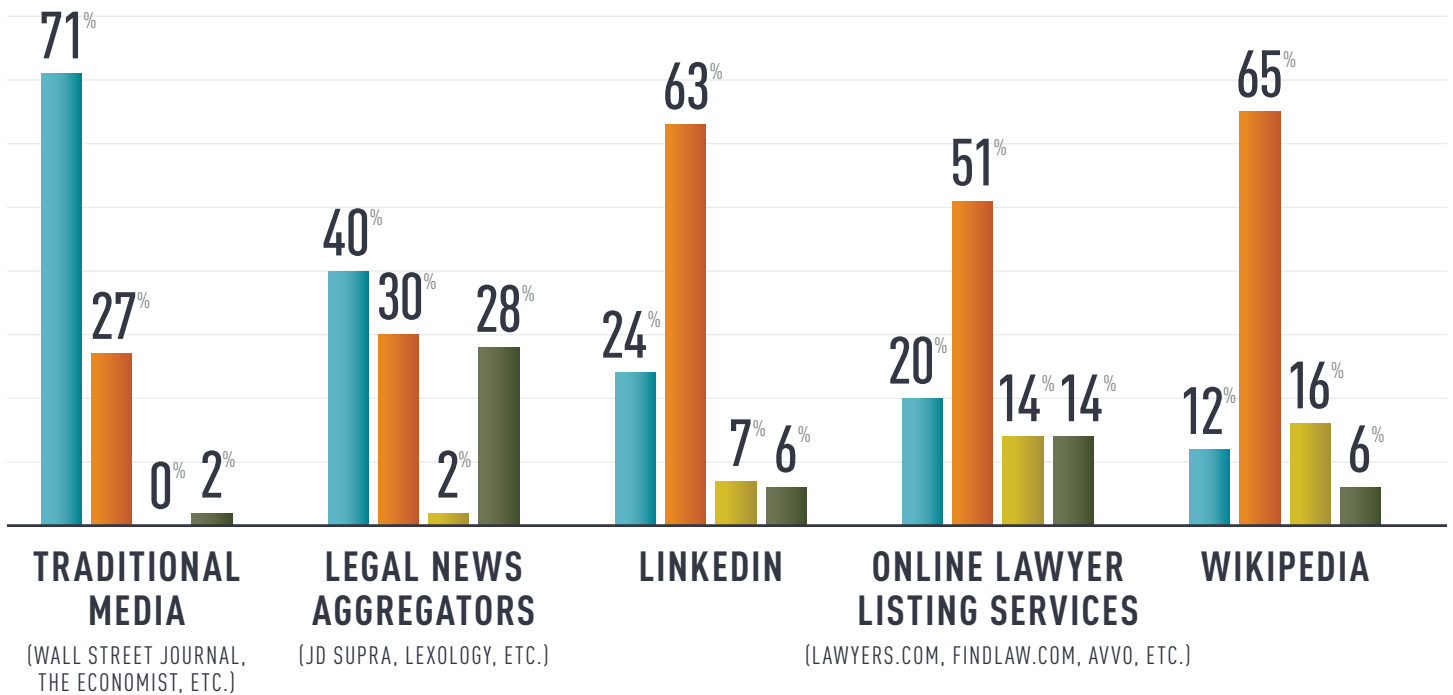
Please indicate how recently you used the following social networking and new media tools for professional reasons.



Please rate the following in terms of their credibility as sources of legal, business and industry news and information.

TOP 5 CREDIBILITY

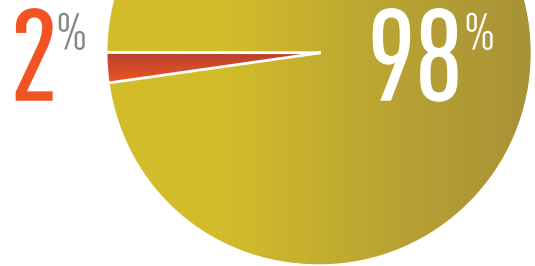
● VERY CREDIBLE ● SOMEWHAT CREDIBLE ● NOT AT ALL CREDIBLE ● DON'T KNOW



LAW FIRM CMO/MARKETER SURVEY

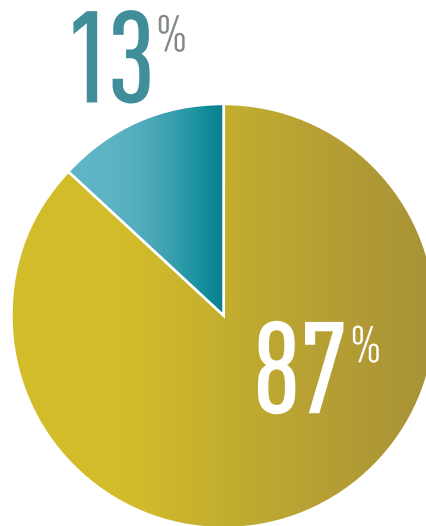
Does your firm actively engage in content marketing?

- YES
- NO



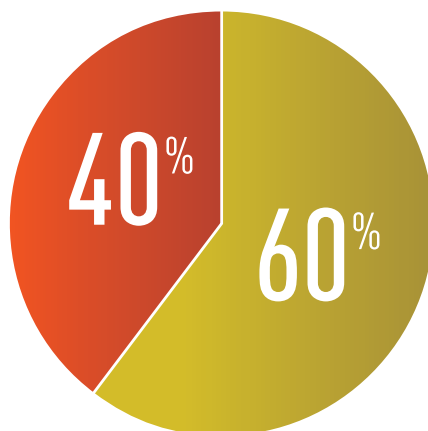
Do you expect that your department or firm will produce more content in 2015 than it did in 2014?

- YES, THE AMOUNT OF CONTENT WILL GROW
- THE AMOUNT OF CONTENT WILL STAY ABOUT THE SAME
- NO, THE AMOUNT OF CONTENT WILL DECREASE



Do you currently have a single person who oversees content-marketing strategy and implementation at your firm (e.g., director of content strategy)?

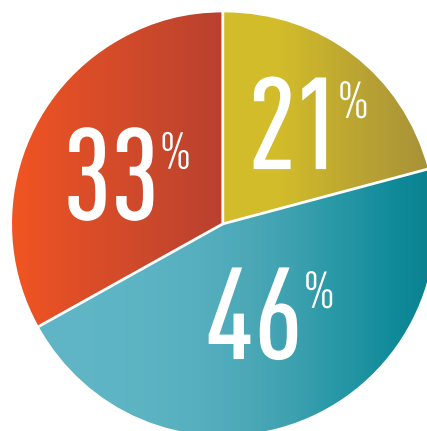
- NO
- YES



Do you have plans to create new and innovative content vehicles in 2016?

(e.g., launch a digital newsroom such as GE's GE Reports or Chevron's Richmond Standard)

- YES
- NO
- NOT SURE



About



About Greentarget

Greentarget is a strategic communications firm focused exclusively on the communications needs of highly competitive business-to-business organizations. We counsel those who counsel the world's leading businesses and direct the conversation among their most important audiences to help deepen the relationships that impact the long-term value of their organizations.



About Zeughauser Group

Zeughauser Group is the firm of choice for legal industry leaders seeking to increase competitive advantage and profitability, enhance market position, and strengthen organizational culture.

7 Strategies to Succeed at Law Firm Leadership

By John Remsen Jr.

The title “managing partner” falls short of the mark in describing the work of a law firm leader. “Chief executive officer,” in my opinion, is more accurate. Terminology evolves so that some titles no longer reflect their original meaning.

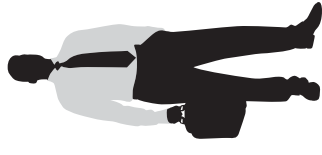
MANAGING PARTNER HAS BECOME SUCH A TERM. When a managing partner is named, is the law firm really appointing a manager in the corporate sense?

A manager, after all, is a caretaker responsible for oversight of a unit or department.

A recent survey on the topic of law firm management and leadership asked those polled to distinguish between a “manager” and a “leader.” Insights that the survey respondents

- Partners perceive themselves as being owners of the firm, having certain prerogatives and independence, not as employees to be managed.
- Each firm has its own personality and culture, and the management techniques effective in one firm may or may not be successful in another.

In the face of these hard realities, many managing partners retreat into the noncontroversial confines of day-to-day man-



A CEO’s primary responsibilities should include strategic planning, setting the future direction of the firm, cultivating relationships with major clients, and identifying and grooming future firm leaders.

agement, putting aside attempts to exercise true leadership. What is needed instead is a well-thought-out plan to lead your firm forward into the 21st century.

SEVEN STEPS TO SUCCESSFUL LEADERSHIP

1 Create Job Descriptions for Yourself, Your Successor and Other Firm Leaders.

Remember, you’re drafting a job description for a CEO, not a manager. Think of your job description as a contract with your partners. At a minimum, it should delineate the amount of time you will devote to management responsibilities. A CEO’s primary responsibilities should include strategic planning, setting the future direction of the firm, cultivating relationships with major clients, and identifying and grooming future firm leaders. To compensate for time lost from your personal practice, the job description should define your pay structure.

LEADING LAWYERS

The hard realities of law firm leadership are apparent. Among them:

- The authority of lawyer management (or leadership) is derived from the willingness of the firm’s partners to be managed (or led).

2 Redefine the Role of Practice Group Chair.

Practice group chairs are too often treated as lions among their prides. Often they are appointed because they are the senior member of the group or the most effective rainmaker. This does not mean they are the most effective manager, the best mentor or the most committed to the success of the firm. Practice group chairs should be elevated to the level of senior management. They should be given the full authority to manage their groups. Practice group leaders need to be chosen based on the ability and the commitment to lead.

3 Get to Know the Firm’s Client Base Personally.

No partner should “own” a key institutional client. Managing partners should reach out to client contacts and underscore the message that the firm—not only the client’s chosen counsel—is pleased to be of service. Ask the client for feedback, learn the client’s business and the industry, and strategize to help the client reach its goals. Do more for the firm’s clients than simply putting out fires.

4 Identify and Hire a Strong Chief Operating Officer.

If you are going to be an effective leader or CEO, you have to get the minutiae off your desk. Delegate day-to-day administrative responsibility to a strong, competent executive director or COO. This person should head up a team of business professionals and serve as your trusted “second hand” on the leadership team.

5 Offer Reforms to “Time and Money” Matters.

You will be asking senior management to take on a more extensive and defined role in the operations of the firm. Adjust the time demands on the executive committee and the practice group leaders to allow for sufficient nonbillable time for them to fulfill their management responsibilities. Likewise, adjust the compensation criteria for



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senior managers to acknowledge the time they must devote to management matters and for the firm-benefiting results that they achieve.

6 Start (or Reenergize) the Strategic Planning Process.

A strategic plan is a living document that requires modification and fine-tuning from the first day it is implemented. If you have been selected as the firm’s managing partner, presumably you have a vision of what you want the firm to become, what you want it to achieve. Sell this vision and muster a supporting coalition among the equity partners. You don’t need to win them all over, but you will need an effective critical mass and working majority. With this group at your back, start small and keep the initial goals simple. Suggest three or four one-year priority items with sufficient low-hanging fruit to show short-term wins. Consolidate your gains and move forward.

7 Maintain Your Firm’s Investment in Its Future.

The challenges of launching new initiatives, creating consensus and moving your firm forward can sometimes cause a firm leader to forget about the little things that, in the end, may prove to be just as important as greater goals. Don’t forget to implement a first-rate training and associate development program. Here lies the future of your firm. Don’t forget about marketing and business development initiatives. These provide the growth that will finance your firm’s future. Don’t forget about technology upgrades. These are the essential tools that keep your firm on the cutting edge and ahead of the pack. And don’t ignore your successor. Heirs apparent need the opportunity to learn the principles of law firm management.

The old Chinese proverb says that a journey of 1,000 miles begins with a single step. Becoming a leader of a law firm is similar. A CEO must, step by step, patiently bring along the uninterested, the doubters and the curmudgeons to join the advocates and the reformers. Bold vision and small steps are the stuff of leadership. LP



Marketing

The Law Firm[®]

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ALM

BUILDING AND SUSTAINING A MARKETING AND SALES CULTURE AT YOUR LAW FIRM (Or, How to Make Marketing Really Matter)

By John Remsen, Jr.

Getting lawyers and law firms do things differently is not an easy task and instilling a marketing mindset among lawyers is a major effort for most firms, resembling the proverbial challenge of “herding cats.”

A national consulting firm recently examined personalities of lawyers from around the country using the Caliper personality index and was able to quality what many of us have known for years. Compared to the rest of us, lawyers

- Hate change, respecting precedent because it was drilled into them at law school;
- Are highly skeptical of new ideas and concepts, demanding proof that change will work;
- Love autonomy, preferring their own judgment over that of any hierarchy or policy; and
- Have a high sense of urgency, expecting immediate results on even complex efforts.

It's not surprising, then, that most law firms (especially smaller and mid-size firms) operate much like fraternities. Governance and decision-making are often difficult and time-consuming, because everyone wants a voice in the process. However, the most profitable firms are moving closer to a corporate model of governance, with institutional goals, strong leadership and streamlined governance. They are also starting to embrace marketing, recognizing the need to get closer to existing clients and invest time and resources on focused, proactive strategies to go after new ones.

So why try to roll the marketing boulder uphill? Simply because any firm that wants to survive in today's increasingly competitive marketplace must support a marketing and sales culture. Mergers, acquisitions and consolidations, rising associate salaries and operating costs, and client cost-cutting are making lawyers run their firms more like a business, and less like a profession. Failure to market brings red ink, irrelevance and an “out of business” sign on your door. Marketing is what enables a firm to attract and retain desirable clients, and it puts the firm in a position to fire the ones it no longer wants.

That said, a marketing culture can't be implemented overnight - it must be slowly, gradually fostered through basic, focused, step-by-step efforts. Overcome typical lawyer impatience and resistance by showcasing successful pilot programs. A communications effort that presents the proof, demonstrates a successful result and validates the judgment of the participants, will appeal to lawyers' lemming instinct: “If Jim can do it, so the hell can I!”

The key, then, is to create the initial success that will make everyone in the firm believe marketing matters. I mean *really* matters. As marketing consultant to thousands of lawyers at hundreds of firms, I've seen that ten key

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elements are absolutely crucial to generate marketing momentum. Neglect even one of them and your legacy will be, "We tried *that* before, it didn't work."

1. Find a Passionate Leader. If a firm's leaders - those lawyers who have the most clout and the greatest respect - aren't committed to marketing, no one will be. Convince them that marketing is an investment in tomorrow, not just an expense for today. Cultivate a senior level marketing czar who is passionate about marketing and inspires others. Don't waste your time on naysayers or junior associates. Convince an alpha male, and the herd will follow.

2. Apply Some Structure. Attorneys are the world's worst visualizers. Vague generalizations about how marketing works won't motivate them. Your marketing effort has to involve concrete, tangible benchmarks and requirements that show the firm is serious:

- Set clear expectations for non-billable time devoted to marketing. Set a target of 200 hours a year for partners and 100 hours per year for associates. Overcoming the billable hour fixation is crucial for marketing efforts, which often take years to generate results.
- Incorporate marketing into partnership requirements. Derail the partnership track of grinders who sit at their computers all day and don't have a book of business.
- Create marketing plans at every level - attorney, industry or practice group, the entire firm. The marketing plans should be written, simple and focused, and should set short-term goals (have lunch with two media industry prospects per month) in the pursuit of long-term objectives (double billings with media clients).
- Communicate marketing successes by every tool at your command. Meetings, emails, newsletters, bulletin boards in the lounge, Intranet postings, monthly status reports, and more.
- Monitor marketing performance. Hold the laggards accountable and reward the performers. Most marketing initiatives must be repeated ten or more times over a period of two-plus years before they pay off. Rewarding only the ultimate result isn't enough incentive. Peg some compensation to *efforts* that emphasize and support the marketing plan.
- Eliminate the time and expense wasters. Scrap "random acts of golf and lunch" and "powerful partner pet projects" that don't support firm-wide marketing objectives.

3. Provide Training and Resources. Sales techniques aren't taught in law school. There are, however, plenty of sales training programs for lawyers that emphasize the basics: if you've taken a prospect to lunch seven times, *ask* if you can handle their contract work. One-on-one coaching sessions can be supplemented by attendance at the Marketing Partner Forum and the Legal Marketing Association annual meeting, participation in the LawMarketing listserv, and circulation of marketing newsletters. Help lawyers overcome their marketing insecurities by exposing them to best practices.

4. Create a Forum of Accountability. The best way to generate marketing momentum is through face-to-face discussions - but *not* with marketing at the tail end of a long agenda. Create specific marketing forums where groups of 10 to 20 attorneys can report on their initiatives, share leads and ideas, and be held publicly accountable for their marketing efforts. Meetings should be held at least monthly, scheduled well in advance for a set time and place, with mandatory attendance and a leader committed to marketing in charge. Distribute minutes and make sure the results are publicized through reports, newsletters and retreat presentations. The only way to overcome resistance to these forums is to make clear that they are about results and accountability - and then use them to reinforce both.

5. Invest Time and Money. Every firm's needs are different, but certain rules of thumb apply - for example, one in-house marketer for approximately every 40 lawyers, and a marketing budget roughly equal to 3% of gross revenues. Lawyers in their skepticism will ask, "Is this *really* necessary?" Appeal to the lemming instinct by demonstrating which other firms are doing at least as much.

6. Identify Your A, B and C Clients. Law firms often fail to identify the clients and the business they want, making little differentiation in attorney time and effort between getting the \$5,000 real estate contract and the \$5 million IPO. You should identify your A-List clients, the frequent flyers you really want to encourage, and emphasize winning more business from *these* guys. Then target them: Go visit them at their place of business, solicit their feedback on your services and act on it, invite them to events and seminars, join their trade associations, wine and dine them. Showing that you really do care about them is the essential step to getting more work from them.

7. Focus on Industries, Not Area of Law. Too many law firms practice marketing by trying to market their practice. Clients don't think that way. They focus on their business and industry concerns, and want their law firm to do the same. Competent legal technicians are a dime a dozen; law firms that talk the language of the hospitality industry are valued much more highly. Focusing on industries targeted by your marketing plan prevents wasting time and effort by trying to be all things to all people. It also promotes cross-selling among practices, as you identify which real estate, corporate, tax and other services you can tailor to clients in specific industries.

8. Get an Identity. Emphasize that you're not just another law firm. Making an impression captures share of mind, then share of market. All the effective marketer's tools apply here: a logo, a short and memorable firm name (no more than two words), sharp web site, readable collateral materials that are not mind-numbing exercises in lawyer-ese, email templates with links back to your web site, promotional items that clients will want to use. Remember that a nice brochure or impressive web site constitute just a small part of a *total* marketing effort.

9. Hire "People People." Lawyers are trained to be good communicators before groups, whether juries or boards of directors. They typically aren't good at establishing interpersonal, one-on-one communication. Rather than trying to turn an introverted lawyer into a rainmaker, it makes sense to hire lawyers with a focus on personality as well as on grades and law journal experience. Look for outgoing types who are flexible and embrace change, and they can become missionaries for your marketing efforts. The same applies to everyone in the organization - receptionists, administrative assistants and (yes) marketers.

10. Manage Lawyer Expectations. All the steps that we've discussed here take time, and the marketing plan they support will continue to evolve. Make sure the lawyers at your firm know and understand this from the start. Set a limited number of priorities and don't try to move too far too fast. But make absolutely certain that you deliver everything that you promise - which, in the end, is a good definition of effective marketing.

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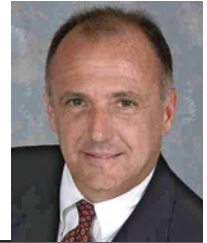
About the Author

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Ten Golden Rules to Make Your New Clients Happy



by John Remsen, Jr.

For most law firms, satisfied existing clients are the best source of future business. They will continue to use your services when they need a lawyer, and they are your best referral source for new clients.

Yet, most clients can't fully appreciate quality legal work because they aren't lawyers. Rather, they judge the quality of your work based on service-related issues, and how they are treated when they deal with you and your firm.

Allow me to use the analogy of the automobile mechanic. If you own a car, you need a good, trustworthy mechanic to keep the car running smoothly and to fix problems as they arise. You don't necessarily want to know what's going on under the hood of your car. Your mechanic is supposed to know all that stuff. And you trust him to treat you right.

If you are like me, you assess the quality of your mechanic's work based on the way you are treated and whether or not you trust him. Does he listen to you when you bring the car in for servicing? Does he keep your car running smoothly? Does he provide an estimate before he starts the work? Is his final bill reasonable and within the estimate? Is your car clean and ready when promised?

These are the same factors that clients apply to lawyers and other professional service providers. They don't necessarily want to know the intricacies of the law. They want a good result. They want to feel like you are taking good care of them. And they want to trust you. These factors are especially important when you are dealing with a brand new client.

With that introduction, here are my "Ten Golden Rules to Make Your New Clients Happy."

(1) Send Your New Client a "Client Welcome Kit"

Be sure to include your firm brochure, a client service

pledge, a current list of contacts with direct dial phone numbers and e-mail addresses, and a nice welcome gift.

(2) Seek to Understand the Big Picture

The best lawyers—the ones who deliver the most value to their clients—take the time to learn about their client's business (and personal) goals and objectives. Visiting your new client's place of business is a great way to get things started on the right foot.

(3) Create Expectations and Then Exceed Them

Walk your client through how you propose to handle the matter and what he can expect in terms of results and timelines.

(4) Always Follow Through on Your Commitments

Nothing aggravates a client more than a broken promise. It also has a very serious negative consequence when it comes to building trust.

(5) Always Promptly Return Telephone Calls, Always

Clients get upset when you don't return their phone calls. Adopt a policy to return all your calls and e-mail messages on the same day.

(6) Communicate in the Manner Your Client Prefers

Ask your new client the method and frequency of communication he prefers and deliver your updates and progress reports accordingly. If you can't be flexible, tell your client up front how you operate.

(7) Introduce Your Client to the Team Working on His Matters

Take the time to invite your new client to your offices to meet the team who will be working on his matter. Be sure to include the paralegals, legal assistants, receptionist and others he is likely to be talking to on a regular basis.

(8) Resist the Temptation to "Overlawyer" the Matter

Trust me; clients don't want to pay their lawyer more

than necessary to have their matter properly handled. Be sensitive to the issue and do what's right for your client.

(9) Never, Ever Send a Surprise Invoice

It's good practice to discuss estimated fees and costs up front with your new client. Beyond failure to communicate, sending a bill that wildly exceeds expectations is one sure way to lose your new client.

(10) Show Your Client That You Appreciate His Business

Be sure to invite your client to your firm's annual client

appreciation event, take him to a ball game, play golf and invite him to lunch or dinner on occasion.

There is more to practicing law than providing quality legal work. You've got to provide great service, too. If you practice these golden rules consistently, you will end up with loyal, long-term clients and an enjoyable and gratifying legal career. And that's a promise! ■

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WASTED TIME AND MONEY

The Top 10 Ways That Firms Squander Precious Marketing Resources

by John L. Remsen, Jr

At the conclusion of a recent presentation I gave to a local bar association, an attorney in the audience asked how law firms are wasting their marketing dollars. "After all," he said, "our firm only has a limited amount of money for marketing, and I want to make sure we are spending it wisely." I was honest, and told him that, in my opinion, many fine firms are squandering their marketing dollars by the bucketful. And it's often in the same familiar ways.

Let me begin with the assertion that, for most lawyers and law firms, effective marketing is all about personal relationships. It's not about brochures, advertising or other marketing gimmicks. It's especially about relationships with *existing* clients and referral sources. Consequently, I almost always recommend that a law firm begin "marketing" by making darn sure its clients are satisfied. If they are, they'll be loyal to the firm and come back when they need legal counsel. Beyond that, they'll tell their friends and business associates about you. Too often, firms get caught up chasing prospective clients, forgetting about solidifying and expanding relationships with the clients they already have.

After ten years of experience marketing legal services, I have developed some strong views on what firms are doing right and wrong. But before writing this article, I thought I'd post that attorney's question to the 1,000-member lawmarketing listserv, a cyber-community of law firm marketing directors and consultants. The responses came back fast and furious and I'd like to share our collective opinions with you.

So here we go - the "Top Ten Ways To Waste Money Marketing Your Practice," in David Lettermanesque ascending order of wastefulness.

#10 - Random Acts of Golf and Lunch

Golf and lunch are fine marketing activities, very conducive to relationship building. But playing golf with an endless array of acquaintances who don't have the ability to hire or refer you is hardly an effective use of your marketing time. Nor is that monthly "skins" match with your brother-in-law and his drinking buddies. The profession's top rainmakers have a plan -- even if only in their heads -- when they go on their boondoggles... er, I mean, marketing ventures. They have determined who they want to get to know better and, from there, they develop a systematic plan to go about building and enhancing relationships with them. The key word is *plan*.

#9 - The "Really Big Show"

Reminiscent of Mickey Rooney and Judy Garland deciding to "put on a show," your firm decides to present the mother of all seminars. Over 300 people spend a half-day listening to you and your partners talk about the latest changes in state law. It was great. Problem is, there was very little follow up. When it comes to seminars and similar events, we suggest that you consider smaller, less formal and more interactive sessions. Think about a seminar *series*, focused on a particular industry, where participants get together repeatedly. This way, the follow-up is built-in.

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#8 - Other One-Shot Wonders

Come to think of it, forget about any marketing activity that does not include follow-up. All the marketing events that your firm sponsors -- seminars, open houses, holiday parties, and the like -- should be looked upon as relationship building platforms. And personal follow is the key to making them work. All participating attorneys should follow up with at least two or three people at each event, focusing on folks who can help them achieve their objectives.

#7 - Brochures and Newsletters That Cure Insomnia

Good brochures and newsletters have their place among effective marketing tools. But who wants to read mind-numbing tomes about the history of your firm and its 14 practice areas? Not me, and not your prospective clients either. Keep the copy concise and easy-to-read. Use bullet points whenever possible. Hire a talented graphic designer who will produce sharp, attention-grabbing marketing material.

#6 - Invisible Advertising

No doubt, print and broadcast advertising works for attorneys with consumer-oriented practices (like family and personal injury law) and I'd recommend an ad in the Yellow Pages in a heartbeat. But things like traditional "tombstone" ads and "one-time" ads in a newspaper or magazine are practically worthless. Studies show that it takes 7-11 impressions before somebody will recall seeing your ad. Consistency and frequency are essential. Here again, hire a good graphic designer and stay light on copy to make sure your ads are noticed. If you want to advertise, do it right.

#5 - Holiday Tchotchkes

Ahhh, the holidays. Talk about getting lost in the shuffle! Effective marketing strategies get noticed and stand apart from the crowd. The holidays are far too busy a time for your cards, parties, and gifts to be fully appreciated. However, if you must send holiday cards, by all means, sign them personally!

#4 - Directories, Directories and More Directories!

Over the past ten years, law firm directories have sprouted like cattails in the Everglades. Unfortunately, most have little marketing value. Decision-makers simply don't use them very much. In fact, our friends on the listserv think that only a few directories, such as LawOffice.com, Martindale-Hubbell and Best's (for insurance defense counsel), are worth the money. Bottom line....hold on to your cash.

#3 - Vanity Letterhead

We're talking about the kind that features every lawyer's name on the masthead. Every letter becomes two-pages long, and each time a lawyer joins or leaves the firm the old supply gets chucked and a new supply is ordered. Often, the new letterhead is out of date even before it comes back from the printer! Most firms have abandoned this practice and yours should, too. Consider adding a snappy firm logo and/or a splash of color. Don't worry, it's OK.

#2 - PPPPs (Powerful Partner's Pet Projects)

Our #2 money waster was sent in by Bev Davis, chief operating officer for a well-known Oregon law firm....and you know exactly what she's talking about! The firm's \$5,000 contribution for a table at the "Belles of the Confederacy" Dinner Dance, for example. Powerful Partner Jim thinks it's a great idea. (So happens his wife is on the Board of Directors.) PPPPs are rarely budgeted and are hardly ever consistent with firm-wide marketing objectives. They

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tend to consume vast quantities of money and staff time. A firm-wide marketing plan goes a long way toward reducing the number of PPPPs. Show Jim the plan and just say no!

#1 - Consultants Who Don't Know ** About Law Firms**

Law firms are a different kind of beast -- big egos, lots of democracy, convoluted compensation systems and, in many cases, a disdain toward marketing. Yet, I see it happen time and time again. "We hired Sally because we liked the work she did for our big banking client. But she never could manage to implement much of anything around here." When it comes to building consensus for a new idea or getting people to focus on non-billable activities, there is nothing quite like a law firm. It takes someone who's been there to make it happen. If you decide to hire a consultant, hire somebody who has a successful track record working with law firms like yours.

Well, that's it for now. I hope you enjoyed this round-up of marketing blunders. Perhaps you recognized one from your own firm's recent efforts on the list. My objective was to help you think about how you and your firm can more wisely spend your marketing dollars. After all, you have limited resources. My best advice....develop a proactive, firm-wide marketing plan. See you at the 19th hole!

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About the Author

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