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Developing a Roadmap for Establishing a Sales and Marketing Culture in Your Firm
18th Annual LMA Conference, Pre-Conference Workshop
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The following is a compilation of best practices that were collected during the above-referenced workshop

Vision and Strategy Factors

- Choose the right leaders
  - Internal managing partner
  - External managing partner
- Strategic planning
  - Need to approach different groups in different ways
  - Know your champions
  - Business development committee
    - Multi-office
    - Get excited people together to spread the word of mouth
    - Engage senior level members
- One marketing liason for each Department
  - Leaders push ideas to the Department, have plans and communicate them
- Individual attorney planning, mandated by the executive committee, goals coordinate with firm goals
- Practice group plans, leaders buy-in but not clear that it trickles down
- Firm-wide structure to support investment time and make it part of allocations
  - Some firms starting step-by-step, ask for one hour per week
  - Others ask for 200-600 hours a year
- Firm chairman appointed subcommittee of partners in various practice groups and offices to work with marketing
- Firm has a “marketing partner” who oversees marketing efforts of the whole firm and who gets buy-in because of partner status
- Determine revenue goals and build from the bottom up
- Tie business development into compensation
  - Business development hours are credited toward billable hours
- Marketing networking workshops
  - Networking games with follow-up discussion
- Marketing is involved with orientation of new associates and is also part of the review process
  - Ask marketing to identify those who stand out

    - Marketing has an impact on compensation
- Research – Google/Lexis/Nexis/Court Link/OneSource
    - Get references – hire outside sources
    - Media search
- Achieve senior level buy-in
    - Gather data
        - Client feedback
        - What other firms have done
    - Have a clear objective
    - Be able to track results
        - ROI
        - Source tracking
- Retreats
    - Cross-selling
    - Share results
    - Training program
    - Plan for it in advance
        - Conduct an electronic survey prior to the retreat and use the data to design the agenda
    - Pick appropriate season
    - Add a fun component
    - Team-building
    - Play an internal trivia game
    - Profile attorney and staff information
    - Conduct business development retreats with associates

Commitment/Accountability Factors

- Marketing database
    - Must fill out a project form for speaking engagements and articles
- Marketing document management system – consolidated and centralized all marketing documents and proposals into one place
- Respond more strategically to RFP's by having an internal team review the RFP's to determine if the firm wants the business
- Use staff to send information to marketing department
- Require attorneys to update their CV's on a regular basis with articles, speaking
    - Send regular emails reminders
- Measurements
    - Internal newsletters
    - Case list put out once per week, e.g. all new and ongoing matters
- CRM
    - Each lawyer has access and can generate specific reports
    - Marketing director gets new client matter forms
    - Periodically give attorneys their lists to review
    - Proactively help lawyers find information
    - The role of staff is very important
- Monetary rewards for billings and client relationship management
- Material giveaways for secretaries to maintain contacts

- Refining reports
    - Billables/realization information distributed which makes people bill properly
- InterAction
    - Top practice area leaders part of beta committee
    - Cascading value proposition that shows all levels
    - Matter management and CRM tied in with knowledge management
- Need to show what other firms are doing
- What attorneys work on must tie into the overall strategy
    - Require approval from marketing, knowledge management and recruiting
    - Be specific at the practice group level
- Take small steps, don't make it insurmountable
- Groups of attorneys get together to identify prospects
    - Monthly, cross practice areas, include next steps
    - Breaks down barriers
    - Useful educational tool
- Women's lawyers group
    - Find other women who are in leadership positions and continually build the group
- Break annual cycle into 30, 60 and 90 day cycles
- Have outside coach if budget allows
    - Provides objectivity, "better" than in house marketing
    - Follow up outside coaching with a plan to sustain the momentum
- Individual lawyer plans – have senior partners mentor hungry young lawyers. Find out their interests (writing, speaking, etc.) and empower them
- Target client list
    - Each partner assigned a target once per month and they give progress reports at lunch meetings
- Interview each attorney regarding their goals, interests, etc., and create a business development plan
- Incorporate what is happening in attorneys lives into their plans
- Let lawyers know what each other is doing re: speaking, writing, etc., to drive competitive juices
- Measures
    - Events – approach and follow-up plan
- Action items
    - Follow-up by marketing is extremely important
- Have firm President or Chairman attend staff meetings to show commitment and support
- Department heads in meetings reinforces the commitment level. Evict people from meetings if they have not done their homework
    - Attorneys receive calls or letters from the managing partner
- Have managing partner conduct "Town Hall" meetings in each office
- Managing partner give out awards for , e.g., outstanding staff, outstanding lawyer, etc.
- CRM management best practices
    - Have one person/group enter data to prevent inconsistencies and outdated information
    - Have billing department cc you on any/all changes

Training Factors

- Reminder in calendars to set up call/lunch date every other week
- Marketing department should take the temperature of attorneys marketing activities mid-year
- Get attorneys to commit to practice groups or industries
- Form client service teams
- Give attorneys individual marketing budgets
  - Give them guidelines to follow
- Conduct training with an accounting firm, end with cocktail hour to "practice" new skills and to promote networking
- Match the right coach/trainer with the right group, match personality, level, etc.
- Hire consultants that will work with the firm for at least a year so that a relationship will form and the consultant can learn about the firm and make effective suggestions.
- Three sections of training that is a multi-year process
  - Business development for second and third year lawyers, teach the basics
  - Mentoring for next three years
  - Rainmaking for last year
- Can training on business development give CLE credits?
- Practice group training sessions for half-day
  - Mix with different levels of experience to learn from one another
  - Three to four topics and each is taught by one of the partners
- Newer associates training to get them up to speed on the firm, billing, business development
- Staff training
  - If they refer a client, provide referral fee (everyone knows someone)
- Marketing training done with groups of twelve, mix practice groups
  1) Three hour training
  2) Forty-five minute one-on-one meetings
  3) Ninety days of follow up
- Client survey training to identify satisfaction and needs
  - Any interview is better than none at all
  - Do a beta test with a few attorneys
  - Later introduced a second round which was a better program
  - Train those who want to be trained
- Used Bill Flannery training firm-wide, quarterly, sent large groups of partners through which helps attorneys look through the eyes of the clients. Worked well and brought enthusiasm back to the office
- Business development breakfasts for associates
  - Problem is that some associates hate training and are afraid, especially if it involves interaction, concerned they will be embarrassed
  - If only associates they will feel more comfortable, you'll get their real story
- Mentoring by partners is essential
  - Summer associates program can be the beginning
  - Buddy system with other attorneys
- Champions of specific skills sets
  - Event speaking, article writing, etc.
  - Make these people available firm-wide to provide education
- Public shaming – call people on what they committed to do from the minutes and last meeting

- Chief training officer (equity partner) – 100% dedicated to training, education, with no billable hour requirements
- Share successes/best practices from one practice group to another
  - Often they are competitive and this spurs them on to conduct more marketing
- Cross-selling
  - Have attorneys present to other practice groups and/or routinely attend their practice group meetings to build trust and relationships

Implementation Factors

- Firm hired sales person (called Director of Business Development) equal to a partner level to guide the client service teams to success. The marketing team supports the Director
- Floor-walking – marketing director visits each attorney every week to see what they are doing and maps out a plan for each week
- Practice group heads must meet
- Practice groups must report what they are doing
- Identify superstar sales attorneys and develop a special compensation plan for them
  - They may be bringing in more revenue by bringing in more business but may not have the billable hours
- Poster/postcards across the firm with client service top five things to do, e.g., "Know Your Business"
- Allow latitude to budget for special/valued initiatives
- Some firms don't budget well enough (or at all) for business development efforts
- Firm-wide restructuring to support behavior
- Clients learn to share data to make numbers more manageable
- IS department shares internal information on matters for specific clients
- Lexis-Nexis Smartlinks to deliver data – marketing coordinates and can get the right people together
- Get a practice group together to discuss what relationships they have and what they are doing
- Document minutes from practice group meetings and place action items into the agenda
- Develop meaningful budget categories
  - Code them to the group leader and make them easier to track

Communication Factors

- Managing partner committed to meet with each lawyer one-on-one to explain the compensation structure, how business development, cross-selling and mentoring are integral components
- Annual bonus – have part of compensation based on attorney business development activities throughout the year
- Accounting firm example – their vision is "community-oriented firm"
  - Vision statement plastered on wall
  - Slogan – "Because people matter"
  - Give money and time for employees to work on charitable events
- Regular partner meetings
- Support staff meetings once a week with a member of senior management involved
- With multiple offices, some firms use video conferencing. The rest is done on office basis
- Advertising for advertising's sake is useless
- Before branding, need to have a reality check on what you are as a firm
- Communication with clients

- Have templates for recap of business development meetings so information can be captured and input immediately
    - Purchase congratulatory cards for clients in bulk and make them easily accessible for attorneys to use
    - "Forty things you didn't know about our firm"
- Distribution of information to show news and relationships
- Major clients watch list and circulating of information
- Use firm intranet to display data like practice group area calendars, top clients and prospects, minute notes, etc.
- Internal newsletters, quarterly, to share new cases, success stories, new clients, etc. This promotes cross-selling
- Weekly newsletter distributed firm-wide via email which lists the big wins by attorney name, deals done, marketing news, business development news, etc.
- Internal business development newsletter
    - Attorneys will want to be in it when they see others who are written about
        - This is communication that would not otherwise happen in the firm
        - Promotes new energy
        - Email format coming from the managing partner
        - Marketer of the month, practice development tips
- Marketing newsletter
    - Once a month
    - Short
    - Profile something big the firm has done
    - People fight to get into it
    - One attorney profile and one support staff profile (get to know your colleagues)
- After launch of a logo, every month for a year hold an event or hand out premiums.
    - Hand out "Kudo" candy bars
- Rewards
    - Core values program
        - Attorneys nominate staff, everyone who is nominated is recognized
        - Identify teams as well as individuals
            - Pro bono work
            - Sales developments
    - Cash prizes donated to charities of choice
- Martindale will put lawyer articles on their search engine