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Local Firm Trying to Raise Its Marketing IQ

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Special to the Legal

Lawyers won't ask questions if they don't know the answers because they are taught to be wary of uncertain outcomes. That's why trying to sell the firm to a prospective client can be counterintuitive to even the best attorneys, and many firms just gloss over marketing during associate orientation.

At least one local law firm is trying to refocus its lawyers' attention when it comes to marketing. Saul Ewing managing partner Steve Aichele said there had been a lot of general talk around the office about how to attract new clients but no direct guidance to back it up. Having served as the firm's marketing partner for three years, Aichele said he understood the complexities of acquiring marketing savvy — and how gaining that knowledge could force a lawyer to contradict his or her most basic training.

"Most lawyers have had the risk-taking drummed out of them by the end of law school. Selling is 90 percent failure," Aichele said. That's why he and the other Saul Ewing managers decided to enlist outside help to offer experienced, long-term instruction in client development.

"It's always better to have somebody learn a system than just tell them what to do," Aichele said. "You have to give people examples." Through the grapevine, Aichele heard about David Freeman, a Boulder, Colo.-based consultant whose company, Whetstone Consulting, specializes in strategic marketing planning for law firms and major corporations. Through intensive retreats or seminars, followed by several months of weekly



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one-on-one telephone consultations, Freeman offers firms what Aichele described as "the kind of training in personal interaction most lawyers don't get."

Freeman, a Fordham University Law School graduate, had a general practice in New York after graduating in 1982. He later spent three years as a legal marketing consultant, and then three more in the corporate world, working as a strategic planning consultant for companies such as Sun Microsystems and Zurich Financial. Eventually, he worked the law back into his practice, and now he consults for any type of law firm for which marketing is a concern.

Saul Ewing hired Freeman to put its senior associates and junior partners through a three-part program. First, Freeman flies East to give a three-hour workshop to a group of about a dozen attorneys. Immediately after that session, he meets with the lawyers individually to get a feel for each attorney's grasp of marketing technique. After the daylong seminar, he keeps in touch with his group members for at least three months. They're free to call or e-mail him whenever they please, but he makes sure to consult by phone with each attorney he has met at least once a week. Over the course of the training, Freeman looks to

help his students restructure their understanding of what constitutes a business opportunity.

For Saul Ewing corporate associate Katayun Jaffari, that meant not being afraid to pass out her card at business events, entrepreneurial conventions, or women-in-business functions — not her typical outlets for developing clients.

"I had difficulty with the networking thing," Jaffari said. "Not a lot of us go to law school thinking we'll need to have a deep business sense when we get out."

But after completing Freeman's program in the fall, Jaffari said, she now sees even cocktail parties as opportunities for making new contacts. That's part of what Freeman calls "networking with a purpose." He said he wants the lawyers he consults with to get away from the habit of fishing for potential clients without a carefully planned course of action.

Tony Forte, a partner at Saul Ewing who underwent training last summer, said he remembers Freeman telling his group to "avoid 'random acts of lunch.'"

"There always has to be a next step after that initial meeting," Forte said, recalling Freeman's advice. "A follow-up e-mail or phone call, or scheduling another meeting [for a later date]. The relationship has to have some place to go."

Jaffari said that during the first month or so of their weekly phone discussions, she would often run by Freeman the lists of questions she had prepared for meetings with potential clients, asking him to critique her tactics. "He really helps you fit into your own skin of business development," she said.

But networking can only go so far, and Freeman emphasizes the need for lawyers to see the attorney-client relationship

from the other side's perspective. Making clients happy might involve more than just handling their legal problems.

"You have to try to find out what you can do to make an exec or general counsel's life easier," said Tom Jennings, a Saul Ewing special counsel who took Freeman's course in March. "Maybe that's making [him or her] look good in front of their boss, maybe it's some ancillary service. But doing so gets the lawyer out of the trap of calling up to offer something that's not needed."

For Jennings, previously general counsel for a private environmental services company, Freeman's philosophy of differentiating oneself in the eyes of prospective clients resonated. "As general counsel, I always found myself thinking, Can this [lawyer] make my life easier or harder?"

"It's all about setting yourself apart from the 20 other lawyers who walk in to that GC's office behind you," Freeman said.

Suzanne Mayes, Saul Ewing's hiring partner, took the course in the early

spring. Shortly afterward, she made an appointment to meet with a former client from whom she hoped to solicit more business. During their weekly phone call, Mayes asked for Freeman's advice on how to rekindle the relationship. Freeman asked if the client's company had done anything of note lately, and Mayes replied that it had just completed a new facility.

"He told me, 'Ask for a tour of the facility. They'll see you're truly interested in them and what they do,'" Mayes recalled. "As a lawyer, I know enough to drive out to where the client is for lunch, but it may not have occurred to me to go that extra step. David helps you bring your marketing interests to the forefront."

Forte also acts as the marketing liaison for Saul Ewing's career development committee. He said every associate hired by the firm is assigned an associate mentor and a partner mentor; the mentors stress marketing skills from orientation on, and associates receive specialized instruction depending on their experience level.

After six years at the firm, Saul Ewing lawyers are eligible for Freeman's course.

Aichele first offered the training to a core group of junior partners and senior associates. At present, 75 Saul Ewing lawyers from all departments and offices have undergone training, and Aichele wants that number to keep increasing. "The training [with Freeman] could never substitute for the mentoring process," Mayes said, "but it really helps formalize the training of our associates."

And, perhaps, the most valuable commodity that marketing consultants such as Freeman can offer law firms is simple accountability.

"You know there's that conference call [with David] every Thursday," Forte remembered. "And if you haven't followed through on what you promised him, you would ... well, you can expect him to kind of give you a kick in the pants." •

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