

Zen & The Art of Legal Networking

INSIGHTS & COMMENTARY ON RELATIONSHIP BUILDING WITHIN THE INTERNATIONAL LAWYERS NETWORK

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The Path to World Class - Exploring the Attributes that Distinguish Top-tier Legal Marketing and Business Development Teams



The last session of the day on Tuesday was "The Path to World Class - Exploring the Attributes that Distinguish Top-Tier Legal Marketing & Business Development Teams." After a long day at the conference, this session was going to have to be very interesting to hold our attention - and it was!

The panel was moderated by [Joe Calve](#) of Morrison Foerster and featured [Geoffrey Goldberg](#) of Lowenstein Sandler, [Anne Malloy Tucker](#) of Goodwin Procter, and [Barbara Sessions](#) of Winston & Strawn.

The panel was designed to be a nuts and bolts tutorial that we could put into action when we got back to the office. The panelists suggested that rock climbing by your fingernails is an apt analogy to what marketers do, so we'd need all the help we could get.

Involvement in Setting Strategy

The panelists agreed that every legal marketing department should have a role in setting legal strategy. But what does "having a seat at the table" actually mean? There is a spectrum of influence - five places you might be in relation to this idea.

1. The firm doesn't even know it has a marketing department.

2. They know there's a marketing department, but not everyone at the firm knows - it's not broad-based.
3. This is the window of opportunity - practices are interested in hearing your views and getting input, but it's not universal.
4. You're respected in circles in a number of areas, but it's not universal.
5. You're lucky enough to do a strategic marketing and business development job and yours and the firm's expectations are compatible.

The panelists said that marketing and business development was more accepted earlier on among business lawyers than litigators. However, this has changed, in part because of the economic difficulties of the last few years.

One of their first key tips was that having champions and best practices are key to strategy.

Being a lawyer or partner at the firm doesn't always guarantee you a seat at the table - you need to prove your value. You still have to learn listener-ship with your firm when you start there. Now, law firm CMOs are being asked to do more than marketing. So to get a seat at the table, you need to use whatever you've got because you want to be able to help set firm strategy. The panelists asked by a show of hands who knew the difference between marketing and business development, and everyone did. The panelists said that true integration of marketing and business development is essential and said that in an ideal world, business development leads marketing.

They talked about the difference between just getting your name out there and targeting the right people - with \$1,000, you can get 1,000 \$1 bills, write the firm name on them and throw them off the roof. That's literally getting your name out there. Or, you can work on figuring out who you're selling to, and where they are. Marketing without a business development strategy is pointless.

Helping lawyers to understand the product itself, pricing, delivery and client service are also essential. Now, there are so many people to be helped, the challenge is to find out where the greatest value is at the firm. When business is good, we tend to focus more on branding, etc. but on the downside, the focus is more on business development.

Passion for Quality & Service

Another key tip from the panelists was that it's important to have a passion for quality and service. Understand what you're providing and how you can go above and beyond every day in order to best serve your clients. It's important to achieve that on a daily basis - put processes in place that work and keep improving them. One of the panelists said she would love to build in "go out and make magical moments" time in her department for the lawyers as Disney



does with their employees. But we can encourage our lawyers to create "magical moments" for their clients.

Have a Client-Facing Ethos

Having a client-facing ethos is also essential to excellent marketing. Part of your job as a marketer is to act as the voice of the client. That leads to the question - how do you know what the client wants/needs, have you done anything formal? If not, look at starting at least an informal client feedback program.

Groups of partners sitting in conference rooms talking about what they're going to do for clients is just not going to happen. So we, as professional marketers, can help with this. People fall into their comfort zones and lawyers are not necessarily wired for changing what they do, so it's our job as marketers to inspire and motivate them. Barbara Sessions talked about internal versus external clients - as a marketer, our focus is internal. They are our primary market, so it's our job to focus on our lawyers.

Incisive Business Intelligence

Lawyers see the world in one dimension that reduces their work to what's in front of them. Collecting and processing the information and presenting it to our lawyers in a digestible format is key. Providing a safe environment for when that digestion is done is also key. Often, you can get the information that you need on clients, but getting the relevant data pulled out of that and packaged in a way that you can send someone on a pitch with it, or someone can look at it quickly and have a starting point, that's the piece that's missing. Synthesizing it is where the challenge is. In a continuing competitive environment, synthesizing data will be one of the most important things.



Strategic Filter with Spine

Practice and staff leaders who actively filter opportunities and have the spine to gently say no are also essential to world class marketing. You can say no to opportunities by putting them through a marketing filter - do we participate? Do we respond to this reporter? It's the same with business development - do we answer all RFPs? If business development is driving marketing, this shouldn't be a problem. But it's not how real life is or should be - we want targets

of opportunity to present themselves.

For example, a lawyer wants help with writing an article. Ask where she's been published this year, and she rattles off a number of different publications. You say, "Congrats Captain

Scattershot, you spent a lot of time with no benefit whatsoever. If you put yourself in your clients' shoes, unless there's significant overlap, each one of you readers saw your name once. They won't remember you."

So let's put the horse before the cart and apply the business development filter - who are we trying to reach? What are we selling to them? What are *they* reading? Write all articles for *them*, speak at *their* conferences. Don't get your name out there - get your name **right there**.

You have to push back and say no to the lawyers sometimes, but the panel cautioned the audience to not say "no" specifically, but "not this, that instead." Lawyers should walk out of your office with more than they asked for - they should leave with good business decisions and a plan that you'll help them with.

Sometimes you wonder if you should be doing everything for the lawyers, whether it's the best use of your time. So from time to time, you should be enabling them to do it themselves. Joe Calve commented that there are times though when it's best just to say yes.

Support of Firm Leadership

You also need the support of firm leadership - then it's not just your voice, it's also the big growling lawyer standing behind you.

Have the Tools and the Talent

The panelists agreed that having the tools and the talent is key to world class legal marketing. "Size matters" - there are advantages for firms with larger marketing departments because marketing does take a lot of time. If you don't have these resources, look to other people who might have the capability to help you out within the firm - librarians, young associates, and even consultants.

Because of the economy, there is going to be continued focus on headcount, resource management, and how things are structured. Firms are looking at balancing between what they hire outside firms to do that they could do in-house to cut costs. Sometimes, it's better to build the expertise from the ground up in-house.

Also, getting the dynamic right about how to deliver services within your own department is essential. Take the initiative and educate your firm's management about what you need people-wise and tech-wise to do your job. Invest in the tools to garner the information that you need in case someone is hit by a bus tomorrow - we agreed that this was morbid, but necessary.

Need a Hot & Active Sales Program

The panel asked the question "How many of us are really sales people in this space?" Not many, but we're a kind of sales support. Attorneys have shown more capability for doing sales if you reward them for bringing in business. Maybe we're not making the sale, but we're providing the infrastructure for it.

The point of sale in what we're doing is the other person - they're hiring us because they like and trust us, and we've built a relationship. Support the person who is doing the relationship building (the attorney) - it's key to referrals. It's hard to go out in this market, a predators' market, and wear different hats - seller, deliverer of the service. So it's our job as marketers to assist the attorneys in making this process easier.

Have Metrics to Gauge Effectiveness

You have to have some kind of measurables, so you can learn, justify and validate things. There is a tipping point though. Geoff added that although he's a big believer in metrics...and gremlins...that doesn't mean he's seen them work. Finding metrics used to be about justifications for people and cost, but when asked, no one in the room could say that they'd found a metric they could completely track.

However, although tracking metrics is difficult, the panelists recommended instituting even a limited system because if you can collect anecdotal information, at least you have somewhere to put it. If you have a system, you can grow with it.

Need Passionate and Vocal Support from Firm

You also have to have advocates - you simply can't do it without them. Partners will talk about you behind your back and it's important that the people that these other lawyers respect are saying good things about you. If you're a good professional, you're going to wow the partner, but you don't have time to go through a credibility exercise every time with every partner. So you need FODs - Friends Of the Department.

When people can see what you're doing for them, that's the best way to get positive feedback. Make sure that the lawyers want to work with you and everyone on your team - no exceptions.

Someone in the audience asked about core processes the department should have in place - the panelists said an automated proposal system, experience management database, a core CRM system, a mechanism to share information with lawyers, Tikit aspect, and a referral tracking system. They agreed that if you're doing something that you wish there was a machine for, you're probably right - open your mouth and let's go get one.

By implementing these tips, you can offer your attorneys a world-class marketing department. What is your marketing department doing to be world-class? Are you implementing these same objectives, or are you doing something different?

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