

## How a Marketing Partner Doubled His Firm's Revenues

By Larry Bodine, Esq.

Larry Bodine is a business development advisor with Apollo Business Development based in Glen Ellyn, IL. He has helped law firms nationwide attract new clients and generate new business by using strategy, business development training and individual attorney coaching. See [www.ApolloBusinessDevelopment.com](http://www.ApolloBusinessDevelopment.com). He can be reached at 630.942.0977 and [Lbodine@LawMarketing.com](mailto:Lbodine@LawMarketing.com).



Mark Long

Since Mark A. Long, of Portland's Schwabe, Williamson & Wyatt (SW&W) took over the marketing initiatives, the firm has more than doubled its revenues while also providing an increased quality of service to clients.

Long, a native Oregonian, serves as Managing Partner of the 175-attorney firm, which has offices in Portland, Oregon and 6 other locations, as well as Marketing Partner. He joined the firm in 1982 and became the Managing Partner in 2001.

How did he tackle two such daunting tasks? He relied on two law school basics: logic and method.

"As you know, attorneys are a highly skeptical bunch," Long explains. "What I tried to do was approach the marketing process in a logical and methodical manner and remember that it's not about the firm itself. It's about the client."

### Collaboration

Long began by looking at the firm's core competencies. Then he and the firm as a whole discussed what kind of firm they wanted to be and what kind of clients they wanted to serve. "What we did might not be right for everyone," Long notes. "Evaluating the core strengths of your firm can be difficult in a multi-service law firm. In addition, our firm's mission statement, our values as a firm, center on three principles:

- Doing cutting-edge legal work.
- Being paid well for our work.
- Working in an enjoyable environment.

We candidly looked at our firm's strengths in relation to the marketplace and our values. The process was time-consuming but necessary."

What emerged was a decision to bring a cross-section of talents to the marketplace to move the firm in a new direction. And, to do that, Long realized that the attorneys needed to collaborate on projects and with clients. He wanted to fuse this idea of collaboration into the very fabric of the institution and use it to aid the firm's marketing efforts.

### **Creating SMUs**

To this end, he created Strategic Marketing Units (SMUs). Instead of the usual marketing by practice area, the SMUs are specifically organized to meet the needs of a particular client or industry. Attorneys volunteer to join a SMU, and each unit has its own budget and marketing plan. Each SMU also sets its own goals and creates a plan to achieve those goals.

"I found that unshackling everyone from bureaucratic anchors, such as practice groups, made for smaller, more agile teams," Long said. "And SMUs make sense to clients."

David F. Bartz, Jr., the President of the firm, said, "The SMUs avoid many of the challenges to marketing by practice group or by solo. They can move fast, reacting to new developments or opportunities. We have dozens of SMUs in the firm. The specialized expertise and marketing focus they provide allows for our clients to feel more special, for our lawyers to gain specialized knowledge and for our SMUs to be efficient in their marketing efforts."

### **Compensation**

Because of the ongoing collaboration in the firm, Long looked at the compensation structure. Many attorneys collaborated in the opening of a new matter, but most did not receive compensation or recognition for it.

To rectify this, he created the Collaboration Credits program. In this program, attorneys who work together to land new work from existing or new clients share equally in the ongoing financial revenue from those matters. Long created a tracking system that monitors everyone's involvement in the business development process.

This was a key element among the initiatives, according to Bartz. "Building on concepts used by others but tailoring it to work at our firm, Mark has led a process where we "print money." Attorneys who work together to land new work from existing clients or new clients share in the ongoing financial revenue through collaboration credits. We give each and every member of the collaborating team full-dollar credit for the collections generated by the new matter and/or new client. We avoid the divisive effects driven by many formula compensation systems. Collaboration is a firm-wide value, and collaboration credits make it real, every day."

### **Communication**

Finally, Long thought about the lines of communication in the firm. He needed to explain his marketing ideas, outline his collaboration strategy and give recognition to those attorneys who were successful. In addition, he needed to hear what clients honestly thought about their experiences with SW&W and use that feedback to deepen the relationship.

Long decided to focus on two areas of communication: firm-side and client-side.

#### *Firm-Side Initiatives*

In his firm-side plan, Long introduced the Marketing Pyramid presentation and created *The Scoop* e-newsletter.

His “**Marketing Pyramid**” presentation was Long’s simple but powerful explanation of how clients choose lawyers. Using current research and basic logic, he outlined the facts and figures that show how clients choose a law firm and indicated the value of particular marketing tactics. This presentation is part of the ongoing education of SW&W attorneys in relationship marketing.



*The Scoop* e-newsletter was created to highlight the successful marketing activities of attorneys at the firm. The biweekly communication highlights attorney marketing activities including sponsorship of events, published articles, speaking events and community involvement.

These two new programs allowed Long to explain what he wanted and to applaud those attorneys who did it.

#### *Client-Side Initiatives*

In the client-side plan, Long wanted to engender more client focus and better client service. To do both of these things, the firm needed to communicate more effectively with clients, so Long created Client University and instituted Client Audits.

Client University is a simple idea. Clients talk; attorneys listen. Every quarter, the firm invites a key client for lunch with the attorneys. Clients explain about their goals and fears, and attorneys begin to understand the business as the client sees it. Both sides benefit.

Client Audits are a way for Long to find out what clients really think of their experience with SW&W.


"I sit down with a CEO and talk for an hour," Long said. "We talk about how the firm is doing and what we need to do better. But then we talk about the challenges the business faces."

"It's the most fun and interesting part of my job," he adds. "CEOs don't often have the opportunity to talk frankly about their business challenges to their attorneys – or to anyone for that matter. For most, it's their passion, and they wax rhapsodic about what excites them and what keeps them up at night. The vast amount of information I get from this interview allows SW&W to proactively meet the needs of clients in a way that they truly appreciate."

### Looking to the Future


Despite the award, Long doesn't plan to change much of his SW&W marketing plan for the future.

"Lately, lateral attorneys have been knocking on our door," he said. "They wouldn't have been interested in our firm ten years ago. Success begets success."




...a flavor of recent and upcoming goings-on.


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 **Applause**

- **Jeff Bird** was appointed to the Board of Directors of Northwest Business for Culture and the Arts.
- **Nancy Erbe** was named among the "100 Most Powerful Women in Town" by *NW Women's Journal*.
- **Caroline Guest** and members of the Employment Group recently published *The Oregon Human Resources Manual*, a non-technical guide to understanding employment laws.
- **Brad Maier** was appointed as Oregon's liaison to the U.S. Customs and Border Protection (USCBP) by the American Immigration Lawyers Association, Oregon chapter.
- **Alejandro Tosi** was appointed Deputy Region President of the Hispanic National Bar Association's Region XVI.
- **Tom Triplett** was recently named by Labor Relations Institute as one of the top 100 labor attorneys in the nation.
- The firm was awarded a **BlueWorks certification** by the City of Portland's Office of Sustainable Development.
- Chambers USA has named the following attorneys as among the top in their fields: **Dave Axelrod, Dave Bartz, Carmen Calzadorta, Bill Crow, Patty Dost, Tom Dulcich, Michael Garone, John Guinasso, Terry Hauck, Daniel Knox, Mark Manulik, Martha Pagel, Elizabeth Schleuning, and Mark Stayer.**

 **Client Corner**

- **Luis Machuca, CEO, and Kurt Koehler, CFO, of Kryptiq Corporation** will be our guest "professors" at an upcoming session of Client University, to be held in the Portland office's Metolus Room on Tuesday, September 11 at noon.

 **Press Box**

- "Oregon Reporters Face New Workplace Rules After 2007 Legislature," *Cascade Business News*, June 20, 2007 (**Bethany Graham**).
- "Mortgage Lenders Under Fire: How to Protect Against Wage and Hour Collective Actions," *Mortgage Press*, Seattle and Portland, July, 2007 (**Michael Garone and Renea Saade**).
- "Inside the Deal: Lunch Opens Doors to a New Firm," *Puget Sound Business Journal*, July 20, 2007 (**Curt Smelser and Aaron Laing**).
- "Enforcing Letters of Intent in Real Estate Transactions," *Cascade Business News*, July 18, 2007 (**John Guinasso, Myles Conway, and Jeffrey Oswald**).
- "Pre-Condensation Planning," *Daily Journal of Commerce*, Seattle, July 27, 2007 (**Dennis Dunphy**).
- "Liening" Away From a Lawsuit: Washington State Can Protect Subs," *Vancouver Business Journal*, August 3, 2007 (**Phil Haberthur**).