

Zen & The Art of Legal Networking

INSIGHTS & COMMENTARY ON RELATIONSHIP BUILDING WITHIN THE INTERNATIONAL LAWYERS NETWORK

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Maximized Marketing: Budget Boundaries and Successful Strategies for Small to Mid-Sized Firms



Although I did attend a morning session on Wednesday on client retention, it ended up being a bit of a vendor commercial - and not for something I felt I wanted to endorse on Zen. So instead, we're jumping right ahead to Maximized Marketing: Budget Boundaries and Successful Strategies for Small to Mid-Sized firms.

The session was a bit introductory, but with over half the room saying that they were new to legal

marketing, it made sense. Plus, it was a good refresher for the rest of us, and great to hear what a Managing Partner had to add to the session.

The session included [Marguerite Downey](#), Director of Communications & Client Services for Adduci Mastriani & Schaumberg LLP and [Patricia A. Harris, Esq.](#), Managing Partner for Zetlin & De Chiara LLP.

Not only was most of the room new to legal marketing, but the majority of the audience also served as the sole marketer at their firm. Although this can present difficulties, as the speakers pointed out, having a committee of one isn't such a bad thing! They also said that you can leverage limited resources efficiently with creative solutions at a smaller firm.

Patricia introduced herself by saying that she has something in common with the marketers in the room - "No one wants us in their office." This got a laugh out of everyone before we jumped into their presentation.

Find Your Culture

Patricia said that she thinks that all the partners at law firms recognize that marketing is an essential function for the success of the law firm. However, while you'll find some attorneys who will do anything for you, there will be others who know it has to be done, but are "too busy."

There are essentially two types of legal work - procedures (things you do over and over again) and complex (bet the company type work). How do these translate to marketing activities? Those who are doing procedural work are the ones with subway ads - they have a different marketing strategy. Their goal is to reach the masses as cheaply as they can.



But for more complex work, ads are the last thing that can help those attorneys - they are often known already to their target market, so placing ads doesn't do anything for them. Management needs to consider the practice type, firm culture, strength and interest of attorneys and how they should manage before entering into a marketing program.

Marketers also need to look for the right fit in the firm's culture - the people bringing in the business will need the lion's share of your time. But there are roles for the other attorneys at the firm too. Just because someone doesn't want to shake hands in an exhibit hall at a conference doesn't mean they aren't a good writer or webinar presenter. With a little thought, you can find a place for everyone at the firm.

Patricia said that for your budget, assume that you should spend 3-7% of the gross revenue of the firm - these numbers are for much smaller firms. For the AmLaw 100 and 200, it's a much lower percentage of gross revenues.

Associates & Marketing

The speakers then moved on to talk about associates. Patricia said that they don't say no to associates who are willing to do something outside of billable work. For example, an associate came into their marketing manager, said he had some downtime and would be willing to write some articles - they were thrilled about this, and encouraged him.

Patricia said that every dollar spent on an associate is money well spent, and her firm supports it. She said that there are lots of reasons to invest in associate training, including showing them that they are valued by the firm. The question was asked "should associates make rain?" and the answer from the speakers and the Twitter audience was a resounding "yes."

Find Your Champion & How to Budget

With smaller firms, a lot of times, the marketer came in with another role - they're not only now the marketer, but they also built the position. Marketers should be in on the committee meetings and partnership meetings. Patricia said that to get a seat at the table, the partners have to be able to trust you, so you shouldn't be "Glenda Gossip." If the partners don't want to let you in, you need to find some champions in the room to help you.

However, having a champion at the table for you isn't a substitute to being there yourself. That person might not be a better voice for marketing than you are. You also need to know who your friends in the room are. Patricia recommended getting into someone's office on a weekly basis with someone who will listen to you and help you. She said that you're not an attorney - you're staff - so you need a partner advocate to be able to help you get stuff done.

Along with finding a partner advocate, it's important to communicate the length of time your projects will take - things often sound like they take much less time than they do. If your partner advocate learns how long a project is taking you, and they think that there might be a better use of your time, they can often assist you in finding someone else at the firm to help. So as much as you can explain the time it takes you to do things, in a nice way, do it.

Marguerite said that you may want to go to the office manager from time to time and say "I have 20 hours of work - who can you give me?" That way you can be managing your time better and focusing on the projects that you should be dedicating your time to.

Patricia also suggested that marketers know the compensation for your partnership - how can you plan a budget if you don't know how they're compensated? This also helps in understanding what drives your partners, which can help you do your job better. Additionally, Marguerite said that she tracks her time by partner and practice area - not only does this give her an appreciation for the tracking that her attorneys do, but it helps her to see where the budget goes.

This also helps when you can show the partners that you spent x amount of time on something, and brought x amount of money in. However, they cautioned that you need to be careful politically that you're not spending too much time on one partner and not another.

Patricia said that marketers need to toot their own horns - she said it's not thought of negatively, because that's the culture of law firms. She said that when planning projects and budgeting, it's a good idea to go in with a very well-thought out plan and be able to

manage expectations. Then you can ask the person you report to to identify what the priorities are and make sure that you're tracking with the firm's goals.

If you ask this person to bring up the results with the management committee and at partner meetings, this can also help to get you a seat at the table. The speakers recommended looking at both the gross revenues for every practice area and the profit margins as well. You need to know how profitable the practice areas are and typically they won't want to develop the less profitable ones.

An audience member asked if you're focusing on what's more profitable, but an area is not profitable because of the economy, do we say no to supporting them. Patricia said that if there's going to be money in the future, like in real estate, don't give up. But if it's not bringing money in, carefully identify how much time and effort to put in. Think about the near term and the medium term and identify where you're getting hits today - then figure out how to place yourself appropriately.

Marguerite said that part of the process is knowing how you want to spend money now, but you should also be looking at what you plan to be doing five years from now. Then you can be building towards that. She suggested reviewing previous budgets to determine your future - ask yourself what was effective and what wasn't as well as what the lawyers want.

An audience member wanted to know if marketers should employ the same strategies when dealing with multiple offices as when dealing with practice areas and Marguerite said yes.

The speakers summed up by saying that building relationships with attorneys is the number one key to success. They also recommended reading "[Managing the Professional Service Firm](#)" by David Maister.

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