

SALES SPEAK**Award Winners:
What Can We
Learn?****By Beth Cuzzone
and Darryl Cross**

In every issue of *Marketing the Law Firm*, we read about best practices and new trends. However, not even that prepared us for this year's LSSO (Legal Sales and Service Organization Inc.) Legal Sales and Service Awards winners — specifically, the long-term success established in a short amount of time at two law firms.

The Legal Sales and Service Awards recognize the cutting-edge work of individuals and/or teams in law firms who are playing critical roles in the ongoing financial health of their firms. Even the collection of nominations was an eye-opening look at the truly revolutionary activities and efforts going on inside the modern law firm. All finalists should be proud of their work. However, there had to be winners, and here they are.

'TEAM EVEREST: THE PEAK PERFORMERS SUMMIT'

Last year, Benesch, a mid-size firm in Cleveland, launched a program known as Team Everest: The Peak Performers Summit. This was an in-person gathering of the top business-generating lawyers at the firm. It was an opportunity to gather all of them together in one place to focus on how to grow

*continued on page 6***Engaging Lawyers in a Follow-Up Initiative:
A Case Study****By Cindy Sharp**

Logan Patterson, a seasoned legal marketer with 20 years of experience in the field, was recently hired as CMO of a medium-size law firm. He finds that a small group of elite rainmakers generates the lion's share of the firm's revenue, and he shares leadership's concern about the long-term sustainability of certain practice areas, since many of the rainmakers are quickly approaching retirement age.

While a handful of the firm's lawyers are engaged in productive business development activities, including writing, speaking and networking, the general attitude is that these activities are a waste of time, as referrals are rarely generated. Patterson concludes that the results are not stellar in large part because the attorneys lack a follow-up strategy. Furthermore, no system is being utilized to record goals, completed activities and other successes. Consequently, potentially valuable relationships are falling by the wayside out of pure neglect.

GROUP COACHING PROGRAM

Having had success with group coaching in the past, CMO Patterson establishes a six-month pilot program and chooses eight attorneys to participate. The focus of the program will be on developing the habits and skills of leverage and follow-up. Although increased revenue is the ultimate goal, the success (for now) will be measured by the number and quality of follow-up activities.

The group-coaching format was chosen for several reasons:

1. The CMO does not have the resources for one-on-one coaching;
2. He hopes to set up a competitive atmosphere that will inspire increased activity;
3. A group dynamic can lead to enhanced growth and insights — attorneys who watch other group members break out of comfort zones and succeed with new techniques may be more likely to follow suit;
4. The group setting allows for constructive feedback from peers; and
5. As the participating lawyers deepen their relationships with each other, cross-selling opportunities are more likely to present themselves.

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Follow-up

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EXCERPTS FROM THE INTRODUCTORY MEMO

To get the ball rolling, Patterson circulated an explanatory memo to the participants prior to the first meeting — portions of which are reproduced below.

MINDSET & TOOLS

Generating new business is a prerequisite to high-level financial success at [our firm]. Minders and grinders play a crucial role and we welcome them. However, if you choose that career path, it is unlikely that you will enjoy the generous compensation of our top finders.

Sometimes you will get lucky and receive referrals seemingly “out of the blue.” However, building a significant and sustainable practice takes planning, commitment, effort and persistence — especially in today’s competitive environment.

Let me relate an example of a scenario that is all too common: Attorney attends networking event, has a stimulating conversation with a lawyer practicing in a different field who seems interested in establishing a referral relationship. Business cards are exchanged, a “nice to meet you” email is sent out. Nothing more happens, and yet another promising relationship goes up in smoke. Not only have opportunities been lost, but the time spent attending the function was squandered — at least from a business development perspective.

Our work together will be geared toward preventing this type of unnecessary waste and to promoting a mindset under which you will learn to naturally leverage each opportunity that you have already created. Over the next six months, we will focus on building habits with respect to various aspects of the follow-up process. Naturally, you will need to

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continue with other vital facets of business development, as well.

Since the Client Relationship Management (CRM) software that the firm uses is outdated, we are researching options that will help us automate our relationship development efforts. However, keep in mind that technology is simply a tool to support the relationships developed by real people. For now, we will use spreadsheets as a way of recording both goals and activities.

FOUR FOLLOW-UP

HABITS TO DEVELOP

As you engage in business development activities prior to our first meeting, try to incorporate the following suggestions, where appropriate. Keep in mind that a change in action will lead to a change in results. Indeed, growth happens when you leave your comfort zone.

1. When you meet a potentially valuable business connection, request a card. If she doesn’t have one with her, capture the contact information on the back of one of your own cards. Ask if it is okay to send information from time to time about various legal issues. Immediately after the event, give the information to your assistant, who will enter it into the firm-wide database. Don’t forget to make relevant personal and business notes about the person, which will make future connection more meaningful.

2. While all relationships are valuable, some have more potential than others and should be given more attention. A good rule of thumb is to send a personalized email or handwritten note to each new contact. Comment about the substance of the conversation or circumstance, and attach or enclose a Client Alert or article written by you that showcases your expertise. Don’t forget to connect on LinkedIn. At that point, you can assess whether to invest additional time nurturing the relationship, or whether a less personalized drip campaign would be appropriate.

The firm will send out holiday cards and invitations to client development/appreciation events; however, you are responsible for developing your own personal/professional relationships.

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Never Lose Heart: Appreciating the Human

The Impact of What We Do as Marketers And Lawyers

By Jim Durham

Much of what we learn at the many legal marketing conferences and programs we attend addresses the challenges of competition, innovation, change management and data analytics. Add to that the threat of Artificial Intelligence and myriad alternative legal service providers.

These are all important and relevant topics. Yet we are especially challenged, on a core level, in persuading lawyers and law firm leaders to implement the best practices and innovative business development ideas legal marketers propose to them. This is particularly noticeable in the context of motivating so-called sales activities.

I have previously authored numerous articles and books about re-framing the concept of “sales,” from an act of intrusion to “an act of service,” to motivate lawyers to engage in more client development efforts. Since that approach seemed to find some traction, it prompted me to consider that maybe we should bring a little more humanity into the legal profession.

THE HUMAN TOUCH

Sometimes the legal profession can seem to be too much about money

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and the chase thereof. So, maybe it is time to talk more about the human impact of what we do — we almost never talk about what could arguably be the most important aspect of our professional lives: How what we do as professionals impacts the lives of real people, in meaningful ways.

The professionals we serve are called lawyers, but that is just a professional label. The individuals and teams that lawyers serve are called clients — but lawyers and clients are really just people with hearts, minds and feelings; people who have good days and bad days; people who have blessings and challenges.

For purposes of this article, I will take a break from the educational and training topics you usually find in this great publication, and share some observations I have made over the years on the ways in which marketers actually impact the lives of the people in their firms, and how lawyers can impact their clients in a personal way.

For example, I am sure most marketers provide client service and communication skills training in their firms. I will never forget one time when a lawyer came up to me after a client service program and shared, “I don’t know if doing the things you taught us today will attract clients, but I can assure you, by being here today I am going to be a better husband and father.”

For every person who says that, there are surely dozens of people in your programs experiencing it. I receive emails from legal assistants thanking me for the way a lawyer has changed after a training program. I have saved one such email, which says, in essence, “all of us who work on the 14th floor have been talking about how Lawyer X has changed and is treating us so much better. It’s as if the curtains were opened and the sun has started shining through. Thank you, thank you, thank you.”

Let’s be clear, this has nothing to do with my training skills or content — it is the same content that all legal marketers and consultants

— focusing on empathy, listening, communication styles, asking for client feedback and forming authentic relationships. Don’t under-appreciate the importance of what you do, as a highly skilled marketing professional.

MAKING A DIFFERENCE

Maybe it was that time that the head of HR was having a particularly tough day, and the time that you spent supporting him with empathy, support and ideas enabled him to go home to his family or friends with a sense of calm.

Have you ever trained and mentored someone who went on to be a star in the legal marketing industry? That is not benign — you likely changed that person’s life in a profound way.

I bet many of you have coached lawyers who are questioning the direction of the profession or their decision to practice law, and I suspect that you assured them either that they made a good choice or that the profession has not gone completely off the rails. In those moments, you may have given them new resolve or even clarity about alternatives — you made a difference in their personal lives.

Next time you work with a lawyer who is wondering about whether or not she is making a difference, because she is too focused on the money she can make or the intellectual skills she has developed, ask her to think about a client whose life she may have changed in their career.

It might have been a tough deal she successfully made happen to save a family business — impacting generations of family members. It could have been the time she insisted that someone create a Will, and tragedy struck soon after.

You might remind her of the time that a small agency was served with a restraining order, putting them out of business (at least temporarily) and threatening the jobs of a dozen people whose families depended on them — the lawyer got an emergency hearing and the TRO was lifted the next day.

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Leadership

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“Yes,” they may say, “that is what I am paid to do; that is my job.” But their job matters!

Early in my career as a lawyer, a client asked me to represent her in a case of “undue familiarity.” (A therapist had crossed the line, engaged with her inappropriately and hurt her marriage.) The Christmas after the settlement, which provided for 10 years of much-needed therapy, I received a card in the mail saying that the money gave her comfort that she could overcome the trauma, and ended with her saying that I had saved her life. Maybe that one life is why I became a lawyer. Much

like a Gratitude Journal, maybe we should all keep a journal on how we make a difference.

I really encourage you to appreciate more how much it matters when, in the context of your professional life, you make the people around you more fulfilled, skilled and successful. It can resonate in their homes, the firm and the industry. Sounds a bit touchy-feely, I know, but when I delivered a presentation on this subject at a firm retreat last year, lawyers ranging from the senior-most partners to the youngest associates approached me at the end of the program to share that the presentation I had made gave them a greater appreciation for what it means to be a lawyer.

CONCLUSION

There is an old motivational story about a two people walking on a beach covered with hundreds of grounded starfish. One of individuals stooped down to pick up a starfish and returned it to the water. The other person looked around at the mass of starfish still on the beach and said, “What are you doing? What possible difference can that make? The first person replied, “For that one, it makes a difference.”

We certainly cannot solve all of the problems in the world or in people’s lives, but if we make a difference for even one, that is a good day at work.



Follow-up

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We will assist with the mechanics, but ask you to commit to regular development of written material (such as case studies or client alerts) that demonstrates your position as a thought leader in your chosen field. Consistent development of these pieces will feed the drip campaign alluded to in the previous paragraph.

3. If you are a presenter at a workshop, seminar or conference, it is difficult to follow up with audience members without having their contact information. In the event that the program planner will not share this information with you (which is not uncommon), plan a drawing at the end of your session. Raffle off a book or even small gift card in exchange for the contact information of audience members. Of course, it is then your responsibility to follow up as discussed above. Remember that the stage is already set for a business relationship, as you are framed as an expert by the very fact that you were a presenter.

4. Return every call promptly, especially if you don’t know the reason for the call. We all have people in our lives whom we prefer to avoid, and thus procrastinate in getting back to them. What if the purpose of the call is to refer you a new

matter? This is not so far-fetched, as an attorney I previously coached discovered the hard way. He waited four days before returning a call to a former client he remembered as obnoxious. At that point, another fortunate attorney (who did return the former client’s calls) was busy signing a retainer with the new referral.

FACE YOUR OBSTACLES

Consider what has held you back in the past from following up. While you may cite lack of time as a reason, keep in mind that other attorneys in similar circumstances have built successful practices even though they are “crazy-busy.”

In reviewing the habits and characteristics of prosperous rainmakers, I have observed the following commonalities:

1. Well-organized marketing efforts, which include an easily accessible and up-to-date contact list as well as print and digital files of written material to distribute.
2. Resilience — successful business generators don’t take it personally when a potential client or referral source doesn’t return calls or answer emails. These lawyers mark the calendar a week in the future to monitor whether a response has been received. If not, they reach out again,

believing that the communication partner is simply busy or disorganized and intended to respond.

3. Developing mechanisms for tracking all progress (big and small), which helps to build confidence in the business development arena.

CONCLUSION

Can you identify a group of lawyers in your firm who could benefit from a group coaching initiative similar to the concept advanced by CMO Patterson? Why not start with the format outlined above and expand from there? Other points to consider when organizing a group-coaching program include:

- How often the group will meet.
- Whether the initiative includes any one-on-one coaching.
- Whether accountability partnerships will be encouraged or required.
- What must specifically happen over the six-month trial period in order for the initiative to be declared a success.

Please share with me your successes as well as challenges in implementing a follow-up initiative at cindy@thesharperlawyer.com.



Data Science For the Law

By Andrew Duchon

“Data Science” and “Artificial Intelligence” are terms being thrown around in every field, including legal. But what are they? Why are they generating so much excitement these days? There are many definitions out there, but Data Science is really just statistics of the real world, including business and customer data.

The question is how do you get the right statistics? Often, fitting a line to your data is all you need to do, but what if something more sophisticated is required?

MACHINE LEARNING

Machine learning is one way to get the right statistics. This is a suite of techniques, sometimes using supervised methods: given input X (a bunch of colored pixels), the system should call it Y (a cat); or unsupervised methods: given a bunch of Xs, cluster them into two groups (which we might later label cats and dogs).

One type of machine learning receiving a lot of news coverage these days is neural networks, or deep learning, which is (very) loosely based on the structures of neurons in your brain. Perhaps you’ve seen pictures of the human brain with the different parts labeled. These are essentially layers of neurons that provide more and more sophisticated analyses.

Recently, techniques have been discovered to build artificial neural networks of the same complexity. These deep neural networks have been trained to not just differentiate cats from dogs, but even to “dream” and create art, music and paintings.

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OTHER TOOLS

Data science has other tools in its toolbox. Network Analysis is a relatively distinct set of techniques that are used to get the right statistics when your data is a network, like friends on Facebook, or website links, or supply chains. Natural Language Processing can leverage the structure of language (subjects before predicates in English, usually) to get the right statistics of language, though recent work in deep learning indicates that even this structure can be learned with enough data.

Artificial Intelligence

There are many definitions of Artificial Intelligence (AI), but I like to think that AI refers not just to knowing the right statistics, but acting on them in real-time interactions with the real world, including humans, and working within those constraints.

Robots and self-driving cars are subject to gravity, momentum and traffic laws. Chatbots are (or should be) constrained by politeness. These are things that AI needs to understand and not have to learn in order to be active in the real world. Software systems, like some new ones in the legal field, where the user can interactively train the system, have a kind of AI veneer on top of the machine learning. Finally, beneath all these techniques is a substrate of hardware engineering, software, databases and big data techniques that have made this all possible and not frustratingly slow.

DATA SCIENCE AND YOU

So, what can Data Science do for you as legal marketers and business development professionals? Data Science answers questions. The types of questions fall into a few major groups. Classification: What animal is in this picture? How will this judge decide this case?

1. **Similarity and Clustering:** Which document has a provision most similar to this one? How can we group our clients for targeted marketing?

2. **Generation:** What caption would best describe this scene? Given the basic terms of a sale, how does the legal sales agreement read?
3. **Planning and Optimization:** What are some of the key risks developing affecting companies in XYZ industry? Which question should I ask next to most quickly end this testimony?
4. **Regression:** Given the news and the market, is this company likely to be facing increased legal fees? Given the RFPs we’ve submitted, what can we expect for revenue next year?

If you can characterize your problem as asking one of these questions, then a data science solution may be created for you.

More and more, software companies are focusing these solutions on the legal industry. While eDiscovery software has been around for years, machine learning techniques are now being applied to, *e.g.*, contracts, both for discovery and generation, to jurisdiction selection (which judge is most likely to favor my client?), and to anomaly detection in narratives.

Most of these solutions and most of what lawyers and chief knowledge officers address is text. Lots and lots of text. Identifying the right text, generating the right text, summarizing the text, exposing issues with the text, understanding the implications of the text, etc. These are all problems that lawyers and legal professionals (CI experts, business analyst) must constantly address.

The good news is that this is a golden age for data science: There are really no more impediments to developing solutions to these issues. You can get all the data you want (through cloud-based services — which you also have to pay for). Open-source software is available to implement anything; and though

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Marketing Tech

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you may spend a lot of time understanding it, free online training is also there to teach yourself how to use it.

Of note is open-source software that has come out in the last couple of years that makes it much easier to apply deep neural networks to text. This reduces the need for hard-to-find linguists, who have to work intimately with the data creating rules, and allows developers to focus directly on the problem of translating user need into products addressing those needs.

Of course, understanding those needs takes a lot of time, as well

as understanding how the available data may be analyzed to address those needs. Then it boils down to creativity and effort.

CONCLUSION

Building deep neural networks is still much more of an art than a science, so creativity and intuition are required. A lot of the real effort though, where data scientists like myself spend most of our time, is just addressing the data itself: understanding it, “cleaning” it, and moving it around in scalable ways. This is the non-“sexy” part of the job that no one talks about, but one I strangely find interesting.

In any case, you should expect to see over the next few years many new products based off of these new capabilities, including products from

my company, Manzama, e.g., Manzama Signals™, which will be available in early 2018 (Beta release for clients only this month) to help marketing and business development professionals understand corporate news much quicker and more thoroughly through classification and clustering. With this foundation, other techniques from data science will be able to help these professionals to answer myriad questions we’re just beginning to explore.



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top-line revenue, enhance client service and create new offerings.

The first year was so successful that they conducted a second summit this year as well. The marketing and business development department was key in planning and facilitating the event, and was the driving force behind the execution of the resulting action steps. The firm has a long history of a strong practice management culture. Using this as a foundation, they assembled representatives from all practice groups to create truly an elite group who shared best practices and ideas that benefit clients in realistic ways, to be executed in a timely manner.

The benefits have been many, but the top three worth mentioning are:

1. The program has been a powerful way to motivate attorneys to retain and/or earn their first spot in the group;
2. It creates excitement about the future and collaboration on new services and processes that result in new business as well as better results for the clients; and
3. There was immediate ROI.

Gaining management “buy-in” was no small feat for the marketing and business development department. Taking approximately 25% of the top lawyers out of their offices for multiple days (on which there would be no billing) and incurring great expense for travel was not an easy idea to sell to a law firm in a highly competitive environment. However, the success of the program speaks for itself, as noted above. The program is sure to continue for years into the future.

Congratulations to Benesch and its marketing and business development department for creating a program that cultivates an elite team that is greater in the sum of its parts.

FROM LAW SCHOOL TO THE BOTTOM LINE

The second award, Legal Sales and Service Executive of the Year, was equally as impressive.

Iris Jones, from McNees, Wallace & Nurick, was the winner. Iris created a strategic collaboration program for summer associates. This program gave hands-on business development training to law students who ideally will join the firm at a later date. And when they do, they will already have had training and an introduction to some of the fundamentals of business development.

These skills include how to identify and target clients or prospects, using competitive and business intelligence tools, using relationship intelligence gathered via CRM, and how to analyze industry trends. The program was supported by extensive training and one-on-one coaching on teamwork, presentation skills and effective communications.

To support collaboration as well as healthy competition, the law students were assembled into teams, each team assigned a target. Then, on their own, the teams developed and presented strategies and recommendations for expanding and retaining current business, and finding new business for the firm.

The program had great results, including the firm-wide launch of a formal client team program

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PROFESSIONAL DEVELOPMENT

Getting ‘Gig’gy with It: The New ‘Gig Economy’

Law Firm Marketing Teams Need to Adapt!

By Michael DeCosta

Robert Frost once wrote; “Home is a place that when you have to go there, they have to take you in.” That prose speaks volumes to the level of loyalty family members feel toward one another. There is an implied familial contract that obliges parents, siblings and children to always find a place for family members. For years, there had been a similar implied social contract between employers and employees that suggested an inviolable relationship.

Law firms, perhaps more than most organizations, adhered to that principle. The level of convivial affinity runs deep. Some partners refer to themselves proudly as “lifers” of their respective firms. Their firms were perceived to be existential to their professional identity.

Perhaps only outpaced by Japanese corporations in connection with loyalty to their employees, law firms seek to nurture long-term relations in all of their connections. You see it in how they treat their former employees as well, referring to them as “alumni” or “friends” of the firm. Laudable, indeed, but no longer realistic.

THE NEW REALITY

Unfortunately, all of this implicit loyalty flies in the face of today’s

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so-called “Gig Economy.” If you are not familiar with the term, you should become better acquainted. Loosely defined, it is “an environment in which temporary positions are common and organizations contract with independent workers for short-term engagements.” <http://bit.ly/2yLRty3>.

The U.S Department of Labor Statistics has tracked the contingent workers for decades and reported episodically on their status but the new normal in employment, which has emerged post-recession, has swelled the ranks of independent workers so much so that now the department keeps and reports statistics on this group annually. The number of temporary workers is growing rapidly. It is estimated that by 2020, over 40% of the workforce in the United States will be independent. <http://bit.ly/2zMDlhE>.

Business organizations have long since revolved around a centralized leadership structure. It is how corporations have become so large, especially over the last 50 years. Yet, size is not an indication of success. Just look at General Electric’s stock performance over the decade. Through the credit crisis, we all became familiar with the term “too big to fail,” referring to corporations that had grown so large that it would wreak havoc on the economy if their collective workforces would join the ranks of the unemployed.

That theory, however, was challenged by many politicians and activist citizens. It was a largely unpopular program. Given such vocal objections throughout society, it is unlikely. Government bailouts are simply not going to be doled out as readily in the next recession. It also may not be needed given the workforce trends.

WHAT ABOUT LAW FIRMS?

For the most part, law firms continue to structure themselves in a traditional operating and employment models with a dedicated workforce of talent arranged in an

organizational hierarchy. In today’s Gig Economy, this will unlikely hold. The need for strong management will not go away. Leadership cannot be outsourced. But the idea of legions of full-time employees continuously on the payroll will be difficult to sustain. Rather than enabling scalable models of operational efficiencies, having a larger and larger workforce can eventually impede an organization’s nimbleness and its ability to create or simply adapt to new service delivery models.

Yet, the marketplace for legal services is demanding nimbleness and new delivery options often provided at a lower cost. Moreover, when economic woes slow demand, many larger organizations find it challenging to adjust.

Too often, law firms have been “overhired” and “overfired” to offset the ebb and flow of the economy. This is simply not an efficient way of running a business, especially with a workforce increasingly reluctant to hitch their wagon to just one train.

Just this month, PwC announced the launch of its On Demand Flexible Legal Service, designed to provide staff augmentation for spikes in legal work. Many law firms have already utilized similar temporary employment models utilizing contract attorneys over permanent hiring. They have utilized low-cost services centers located offshore or in tertiary cities throughout America’s heartland. Many larger global law firms operate under a Swiss Verein model allowing for much more local agility.

These are very good models, but more needs to be done. Within these models, there needs to be a more resourceful flexible employment model, too. Despite the trend in other sectors, much of law firm operational personnel remain permanent employees.

LEGAL MARKETING DEPARTMENTS

For years, I heard the collective lament of senior partners

Professional Development

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complaining about paying hundreds of thousands of dollars for a Chief Marketing Officer. In economic boom times, they perceived that the roles were not needed, as phones “rang off the hook.” In economic bust cycles, CMOs’ efficacy was again questioned because the CMOs were seemingly unable to stave off a precipitous decline in revenues. That fodder has finally started to die down as the recognition of their value is recognized. It is widely accepted that CMOs are professionally needed in law firms. But, it has not stopped lawyers’ tendency to scapegoat their own shortcomings on the marketing department at large.

In my role as a recruiter, I hear a rising refrain from partners about “empire building” and “out-of-control headcounts” as marketing teams have continued to grow, with some firms numbering over 100 Full Time

Equivalents (FTEs) in their marketing organizations. As lawyers implement better project management prowess into their own matters, it will not be long before they ask senior marketing executives to do the same.

Undoubtedly, there is more and more to do as legal marketers have experienced an accretive mandate to include business development responsibilities alongside traditional marketing communications roles. While these mandates grow, the correlation between demand and headcount will not increase in parallel. Legal marketers will simply need to do more with less.

I am not suggesting that a website can be revamped entirely by an internal IT department over the use of an outside agency or that a million-dollar rebranding campaign can be replaced by a \$5 per hour freelance consultant working somewhere in Southeast Asia to reimage your logo. Yet, I am pointing out the exaggerated delta between those two price

points. I am also pointing out that these projects, like any projects, have lifespans. They do not require permanent workers.

Benjamin Franklin famously stated; “Guests, like fish, start to smell after three days.” Law firms are not your homes, you are their guests. Your colleagues are not your family, they are your co-workers. We all work in a more nimble, fluid working environment. Your employers do not want to be burdened with large workforces, one of the single largest costs associated with operating a business. Nor do many of today’s younger workers want to dedicate themselves to one employer for their entire careers. Your marketing organizations should reflect that.



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involving the current firm lawyers. All the participating summer associates were offered and accepted positions at the firm. Many of the students noted that a key factor in accepting the firm’s employment offer was experiencing how committed the firm is to delivering excellent service and proactive solutions to clients as well as their fellow attorneys and staff.

This revolutionary program targeting the most junior firm attorneys has helped the firm to expand its target base, attract new clients, and transition the culture into one of “everyone should, and can, develop new business.” Follow the three steps to help move your firm’s sales and service culture forward.

THREE STEPS TO A SUCCESSFUL SALES AND CLIENT GROWTH CULTURE CHANGE

1. *Have a Clear Strategy for Rolling Out Your Initiative*

Although it seems obvious, firms must carefully plan each step in their new sales or service programs, including involving the attorneys into the planning process. In order for your firm’s attorneys to buy in to any change, they need to feel a part of its design, and understand clearly how they may benefit from it.

2. *Test Your Process with Champions*

As with all culture change, select and enlist your “champions” early. After you have developed the clear roll-out strategy for your new program, the key is to involve leadership and rainmakers early, and solicit their input throughout the entire process. In

addition, enlist a beta group to test, refine and retest the process before you unveil to the firm.

3. *Focus on Progressive Success*

No firm will celebrate total adoption and adherence to a new sales or service program during the early stages of its existence. Don’t worry, most attorneys will, but it takes time. As you roll out a new program, measure and reward the adoption of each part of the new process, one-step at a time.

Measuring adherence to your new culture and reinforcing progressive success is what will win sustained and eventual “buy in” from your entire firm.



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