# TABLE OF CONTENTS

## PART I

**Preface** ........................................... v

## CHAPTER 1

**Overview of Marketing in a Law Firm**

§ 1.01 The Changing Environment .................. 1-2

[1] Competition ................................. 1-2

[a] Number of Lawyers ..................... 1-2

[b] Non-Lawyer Competition and
   Investment .......................... 1-3

[c] Legal Process Outsourcing (LPO) ..... 1-6

[d] “Do-it-yourself” (DIY) Options ..... 1-7


[a] Decision Making .................... 1-8

[b] Client Demands ................... 1-9


§ 1.02 What Is Marketing? ....................... 1-14

[1] The Marketing Concept ............... 1-14


[a] “Product” .............................. 1-15

[b] “Price” ................................. 1-16

[c] “Place” ................................. 1-17

[d] “Promotion” ......................... 1-18


§ 1.03 A Client’s View of the Law Firm .... 1-21

[1] Quality ................................. 1-21


§ 1.04 The Marketing Process ............... 1-23

[1] Research ................................. 1-23

[a] Primary Research .................... 1-23

[b] Secondary Research .................. 1-24
CHAPTER 2
The Obstacles to Marketing in a Law Firm

§ 2.01 Introduction .................................................. 2-2
§ 2.02 Intangibility .................................................... 2-3
  [a] Tangible Products and Qualities ... 2-4
  [b] Measurement ........................................ 2-4
§ 2.03 Management and Administration .......... 2-5
[2] Dealing With the Problem ................. 2-6
  [a] Leadership and Management Qualities .......... 2-6
  [b] Committees ...................................... 2-7
  [c] Tenures .......................................... 2-7
  [d] Professional Administrators ............... 2-7
  [e] Integrated Functions ......................... 2-7
  [f] Mission or Values Statement ............. 2-7
§ 2.04 Individualism and Entrepreneurialism .... 2-9
[1] The Negative Impact of Individualism and Entrepreneurialism .... 2-9
[2] Dealing with the Problem ................. 2-10
  [a] Internal Communications .............. 2-10
  [b] Incentives .................................... 2-11
  [c] Mission and Leadership ................. 2-12
§ 2.05 Marketing Information Systems .......... 2-13
[2] Dealing with the Problem ................. 2-14
  [a] Maintaining and Analyzing Information .......... 2-14
  [b] Reporting Information ..................... 2-15
§ 2.06 Production Orientation ................. 2-17
[1] The Negative Impact of a Production Orientation ........... 2-17
TABLE OF CONTENTS

[2] Dealing with the Problem ................. 2-18
  [a] Recognition and Rewards .......... 2-18
  [b] Education ....................... 2-20
  [c] Value-Based Billing ............... 2-20

§ 2.07 Ethical Restrictions ................... 2-22
[1] The Negative Impact of Ethical
  Restrictions ....................... 2-22
[2] Dealing with the Problem ............... 2-23

§ 2.08 Conclusion .......................... 2-24

CHAPTER 3

Marketing Analysis and Planning

§ 3.01 Planning in the Law Firm ............... 3-2
[3] The Essentials of Planning ............... 3-4
  [a] Information ....................... 3-4
  [b] Time .................... 3-4
  [c] Partner/Management Support ....... 3-4
  [d] Decentralized Decision-Making ...... 3-4
  [e] Leadership ...................... 3-5
  [f] Willingness to Focus ............... 3-5
  Approach ........................... 3-6
  [a] Conflicting Directions .............. 3-6
  [b] Limited Resources ................ 3-7
  [c] Public Perceptions ................. 3-7
  [d] Jealousy or Internal Competition ... 3-7
  [e] Lack of Control or Judgment ....... 3-7

§ 3.02 The Marketing Planning Process ....... 3-8
[1] Planning Levels ....................... 3-8
  [a] Firm-Wide Plans .................. 3-8
  [b] Office Marketing Plans .......... 3-9
  [c] Department, Practice Area, or Niche
    Marketing Plans ................ 3-9
  [d] Individual Plans .................. 3-9
[2] Approaches to Planning ................. 3-9
  [a] Research and Analysis .......... 3-10
    [i] Internal Analysis: Lawyer
        Perceptions .................... 3-11
PART II

CHAPTER 4

Developing and Implementing a Law Firm Brand

§ 4.01 Introduction ........................................ 4-2
§ 4.02 Definition of a Brand .............................. 4-3
§ 4.03 The Importance of a Brand ...................... 4-4
§ 4.04 Difficulties in Creating a Brand in a Law Firm... 4-6
  [1] Individualism ........................................ 4-6
  [2] Organizational Structure and Management .......... 4-6
  [3] Short-Term Time Horizon ........................... 4-6
  [4] Historical Complacency ............................ 4-7
  [5] Intangibility ........................................ 4-7
  [6] Names .............................................. 4-7
  [7] Ethical Restrictions ................................ 4-8
§ 4.05 Developing a Law Firm Brand .................... 4-9
  [1] Internal Analysis .................................. 4-9
  [2] External Analysis .................................. 4-9
  [3] Vision or Positioning Statement .................... 4-10
  [4] Living the Brand .................................... 4-11
    [a] Name ........................................... 4-11
    [b] Graphic Representations ........................ 4-12
    [c] Tagline ........................................ 4-12
    [d] Marketing Activities ............................ 4-12
TABLE OF CONTENTS

[e] Personnel .................................. 4-13
[f] Offices .................................... 4-13
[g] Procedures or Policies ................... 4-13

§ 4.06 Conclusion ................................ 4-14

CHAPTER 4A
Selecting Marketing Strategies and
Ethical Considerations

§ 4A.01 Introduction ............................ 4A-2
§ 4A.02 Internal vs. External Activities ........ 4A-4
[1] Internal Marketing Activities ............ 4A-4
[2] External Marketing Activities ............ 4A-4
[3] Selecting an Activity ....................... 4A-4
  [c] What Does the Firm Want to
      Communicate? ........................... 4A-5
  [d] What Will Be the Most Effective
      Medium? ................................. 4A-6
  [e] How Will the Firm Evaluate the
      Activity? ............................... 4A-6
§ 4A.03 Measuring the Return on Your Marketing Investment .. 4A-8
  [a] Establishing Objectives ............... 4A-9
  [b] Setting Benchmarks .................... 4A-11
  [c] Tracking and Measuring .............. 4A-12
  [a] Construction Practice Marketing
      Initiative ............................. 4A-12
  [b] Proposals ............................. 4A-13
  [c] Client Satisfaction Program .......... 4A-13
  [d] Seminar .............................. 4A-13
[4] Conclusion ............................... 4A-14
§ 4A.04 Ethical Considerations ............. 4A-15
  [a] Bates ................................. 4A-15
  [b] Zauderer ............................. 4A-16
  [c] Shapero .............................. 4A-16
  [d] Peel v. Attorney Disciplinary
      Commission of Illinois ............. 4A-16

(Rel. 55)
CHAPTER 5

Client Relationship Management, Enterprise Relationship Management and Marketing Information Systems

§ 5.01 Introduction ........................................ 5-2
§ 5.02 Client Relationship Management (CRM) and Enterprise Relationship Management (ERM) Systems .......................... 5-4

[1] Benefits of a CRM or ERM System ..... 5-4
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identifying and Leveraging Relationships</td>
<td>5-4</td>
</tr>
<tr>
<td>Immediate Access</td>
<td>5-5</td>
</tr>
<tr>
<td>Contact Information and Records</td>
<td>5-5</td>
</tr>
<tr>
<td>Data Mining</td>
<td>5-5</td>
</tr>
<tr>
<td>More Effective and Cost-Effective Marketing</td>
<td>5-6</td>
</tr>
<tr>
<td>Needs and Considerations in Developing a CRM or ERM System</td>
<td>5-7</td>
</tr>
<tr>
<td>Sensitivity to Sharing Information</td>
<td>5-7</td>
</tr>
<tr>
<td>Ease of Use</td>
<td>5-7</td>
</tr>
<tr>
<td>Accessibility and Compatibility</td>
<td>5-8</td>
</tr>
<tr>
<td>Ability to Integrate Client Financial Records</td>
<td>5-8</td>
</tr>
<tr>
<td>Who Has Access</td>
<td>5-8</td>
</tr>
<tr>
<td>Who Maintains the System</td>
<td>5-8</td>
</tr>
<tr>
<td>Getting Started</td>
<td>5-9</td>
</tr>
<tr>
<td>Evaluating Information Needs</td>
<td>5-9</td>
</tr>
<tr>
<td>Evaluating the Options</td>
<td>5-10</td>
</tr>
<tr>
<td>Collecting Information and Populating the Database</td>
<td>5-10</td>
</tr>
<tr>
<td>New Matter/Client Intake Process</td>
<td>5-11</td>
</tr>
<tr>
<td>Support Staff</td>
<td>5-11</td>
</tr>
<tr>
<td>Update Requests</td>
<td>5-12</td>
</tr>
<tr>
<td>Examples of Uses and Reports</td>
<td>5-12</td>
</tr>
<tr>
<td>Client and Practice Area Contributions</td>
<td>5-12</td>
</tr>
<tr>
<td>Top Clients</td>
<td>5-12</td>
</tr>
<tr>
<td>Cross Selling Analysis</td>
<td>5-13</td>
</tr>
<tr>
<td>Industry/Type of Company Analysis</td>
<td>5-13</td>
</tr>
<tr>
<td>Lists and Marketing Activities</td>
<td>5-14</td>
</tr>
<tr>
<td>Other Considerations</td>
<td>5-14</td>
</tr>
</tbody>
</table>

**§ 5.03 Internal Information Collection and Management**

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits of Collecting and Managing Internal Information</td>
<td>5-16</td>
</tr>
<tr>
<td>Improving Client Service</td>
<td>5-16</td>
</tr>
<tr>
<td>Supporting Business Development Efforts, Proposals and Pitches</td>
<td>5-16</td>
</tr>
<tr>
<td>Information of Interest and Uses of Internal Data</td>
<td>5-17</td>
</tr>
<tr>
<td>Lawyer and Staff Information</td>
<td>5-17</td>
</tr>
<tr>
<td>Other Marketing Related Information</td>
<td>5-17</td>
</tr>
</tbody>
</table>
CHAPTER 6
Marketing Collateral Materials

§ 6.01 Introduction ........................................... 6-2
 § 6.02 Purposes of Collateral Materials ................. 6-3
  [1] Providing Information About the Firm and Its Capabilities .... 6-3
  [2] Developing or Enhancing Firm Image ............ 6-3
  [3] Serving as a Marketing or Sales Tool .......... 6-3
 § 6.03 Types of Collateral Materials .................. 6-4
  [1] Brochures ........................................... 6-4
  [2] Presentation Folders ............................. 6-4
  [4] Lawyer Biographies ............................. 6-5
 § 6.04 Preparing Effective Collateral Materials ....... 6-7
  [1] Scope, Audience and Message .................. 6-7
     [a] Scope ........................................... 6-7
     [b] Audience and Message ...................... 6-7
  [2] Organizing Internally ................................ 6-7
 § 6.05 Writing Effective Copy ............................ 6-9
  [1] Be Distinctive ...................................... 6-9
  [3] Organize the Copy Well .......................... 6-10
  [4] Call the Reader to Action ...................... 6-10
  [5] Stress Benefits, Not Features ................... 6-10
  [6] Other Suggestions ................................. 6-10
 § 6.06 Producing Printed Material .................... 6-12
  [1] Design ........................................... 6-12
  [2] Printing and Production ......................... 6-13
 § 6.07 Using the Final Products ....................... 6-15
  [1] Passive Circulation ................................ 6-15
  [2] In Conjunction With Other Activities .......... 6-15
  [3] Copies for Firm Representatives ............... 6-15
  [4] As a Follow-Up Device .......................... 6-15
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>[5] In Developing New Business</td>
<td>6-15</td>
</tr>
<tr>
<td>[6] To New and Existing Clients</td>
<td>6-16</td>
</tr>
<tr>
<td>[7] To Referral Sources</td>
<td>6-16</td>
</tr>
<tr>
<td>[8] Easy Access</td>
<td>6-16</td>
</tr>
<tr>
<td>§ 6.08 Conclusion</td>
<td>6-17</td>
</tr>
</tbody>
</table>

## CHAPTER 7

### Substantive Publications and Other Client Communications

| § 7.01 Introduction                                                   | 7-2  |
| § 7.02 Substantive Communications                                    | 7-3  |
| [1] Benefits of Substantive Communications                           | 7-3  |
| [2] Disadvantages of Substantive Communications                      | 7-4  |
| [3] Developing Firm Communications                                   | 7-4  |
| [a] Purpose and Scope                                                | 7-5  |
| [b] Targeting the Audience                                           | 7-5  |
| [c] Copy and Content                                                 | 7-6  |
| [d] Format and Frequency                                             | 7-8  |
| [e] Design and Layout                                                | 7-8  |
| [i] Hard-copy Publications                                           | 7-9  |
| [ii] Electronic Publications                                         | 7-9  |
| [f] Producing and Delivering the Material                            | 7-10 |
| [i] Hard-Copy Publications                                           | 7-10 |
| [ii] Electronic Publications                                         | 7-11 |
| [g] Evaluating the ROI of a Publication                              | 7-13 |
| [i] Tracking                                                         | 7-14 |
| [ii] Prompting Inquiries                                             | 7-14 |
| [iii] Survey                                                        | 7-14 |
| [4] Other Ideas and Issues                                           | 7-16 |
| [a] Index or Archive                                                 | 7-16 |
| [b] Copyrighting                                                     | 7-16 |
| [c] Inquiries                                                       | 7-16 |
| [d] Leverage                                                        | 7-16 |
| [e] Bylines                                                         | 7-16 |
| [f] Caveat                                                           | 7-17 |
| [g] Contents                                                         | 7-17 |
| [h] Legend                                                           | 7-17 |
| [i] Cross Selling                                                    | 7-17 |
| [j] Listing of Lawyers                                               | 7-17 |
| [k] Soliciting Names                                                 | 7-17 |
| [l] Website                                                          | 7-18 |
MARKETING THE LAW FIRM

§ 7.03 Announcements, Invitations and Other Communications
[1] Announcements
[2] Invitations and Other Communications

§ 7.04 Direct Mail or E-mail Marketing
[1] Writing and Design Considerations

§ 7.05 Conclusion

CHAPTER 8
Market Research and Intelligence

§ 8.01 Introduction
[1] Gathering Information
[2] Sources of Kinds of Data
[3] Designing a Research Project
[4] Conducting the Research
  [a] Data Collection
  [b] Data Sources
  [c] Manipulating the Information (Experimentation)
[5] Analyzing the Data

§ 8.02 Client Feedback Programs
[1] Benefits of Client Feedback
  [a] Fostering Goodwill
  [b] Uncovering Problems or Concerns
  [c] Discovering New Business or Service Opportunities
  [d] Assessing Client Knowledge or Perceptions of the Firm, Its Visibility or Its Image
  [e] Determining Goals or Areas of Emphasis for the Firm’s Overall Marketing Efforts
  [f] Assessing Client Loyalty
  [g] Improving Client Retention
[2] Obstacles to Client Feedback Programs
[3] Areas to Explore
  [a] Assessing Client Knowledge of Services, Including Capabilities and Office Locations
## TABLE OF CONTENTS

[b] Determining What Characteristics of Law Firms Clients Value Most and How the Firm Rates on Each Attribute ........................................ 8-15
[c] Assessing Client Satisfaction (and Uncovering Any Problems or Concerns) with Respect to Arrangements with the Firm ........ 8-16
d] Determining the Firm’s Image or Brand ....................... 8-16
e] Gathering Information on Trends in Client Businesses or Industries and Potential New Service Opportunities ......................... 8-16
[f] Assessing Other Relationships ................. 8-17
[g] Probing Specific Issues ................. 8-17

§ 8.03 Market Research Techniques ..................... 8-20
[1] Written/Electronic Survey ...................... 8-20
[3] Personal Interview ......................... 8-23
[4] Focus Group ................................ 8-23

§ 8.04 Writing an Effective Questionnaire .......... 8-26
[1] Types of Questions ......................... 8-26
[2] Qualitative vs. Quantitative Responses .... 8-27
[3] Sequence of Questions ..................... 8-28

§ 8.05 Other Market Research Applications ........ 8-29
[1] Capturing Internal Information ................ 8-29
[2] Evaluating a New Service or Location .... 8-30
[a] Service Criteria .......................... 8-30
[b] Market Criteria .......................... 8-31
[c] Financial Criteria ......................... 8-32
[3] Researching a Prospect ..................... 8-33
[4] Research as a Marketing Tool ............. 8-33

### CHAPTER 9

**Substantive Programs and Client Entertainment**

§ 9.01 Introduction ...................................... 9-2

§ 9.02 Substantive Programs ......................... 9-3
[2] Planning an Effective Program .............. 9-4
Organizing for Planning .......................... 9-4
Planning the Program ............................. 9-5
Who Is the Firm Trying to Reach? ............... 9-6
How Many of These People Exist? ................ 9-6
How Can These People Be Identified? ............. 9-6
What Is in It for the Audience? .................. 9-6
What Competition Exists? ....................... 9-10
How Many Attendees Are Desired? ............... 9-10
What Will the Format Be? ........................ 9-10
How Formal Will the Program Be? ............... 9-11
Will the Program Be Co-Sponsored? ............. 9-11
Who Will the Speakers Be? ...................... 9-11
When and How Long Will the Program Be? .... 9-12
Where Will the Program Be Held? ............... 9-12
How Will the Program Be Communicated? ....... 9-12
How Will the Program Be Evaluated? ............ 9-13
How Will the Firm Follow Up With Attendees? .. 9-13
What Is the Program’s Budget? .................. 9-15
Organizing the Program .......................... 9-17

§ 9.03 Client Entertainment .......................... 9-26
[1] Events ............................................. 9-26
# TABLE OF CONTENTS

## CHAPTER 10

### Advertising and Public Relations

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>§ 10.01</td>
<td>Introduction</td>
<td>10-2</td>
</tr>
<tr>
<td>§ 10.02</td>
<td>Advertising</td>
<td>10-3</td>
</tr>
<tr>
<td>[1]</td>
<td>Overview of Lawyer Advertising</td>
<td>10-3</td>
</tr>
<tr>
<td>[2]</td>
<td>Steps to Effective Advertising</td>
<td>10-4</td>
</tr>
<tr>
<td>[a]</td>
<td>Identifying the Objectives</td>
<td>10-4</td>
</tr>
<tr>
<td>[b]</td>
<td>Defining the Audience</td>
<td>10-4</td>
</tr>
<tr>
<td>[c]</td>
<td>Determining the Message</td>
<td>10-5</td>
</tr>
<tr>
<td>[d]</td>
<td>Selecting the Media</td>
<td>10-5</td>
</tr>
<tr>
<td>[i]</td>
<td>Television</td>
<td>10-6</td>
</tr>
<tr>
<td>[ii]</td>
<td>Radio</td>
<td>10-7</td>
</tr>
<tr>
<td>[iii]</td>
<td>Publications</td>
<td>10-7</td>
</tr>
<tr>
<td>[iv]</td>
<td>Yellow Pages</td>
<td>10-8</td>
</tr>
<tr>
<td>[v]</td>
<td>Directories and Ranking Services</td>
<td>10-10</td>
</tr>
<tr>
<td>[vi]</td>
<td>Underwriting or Sponsorship</td>
<td>10-12</td>
</tr>
<tr>
<td>[e]</td>
<td>Measuring the Return on Investment</td>
<td>10-12</td>
</tr>
<tr>
<td>[i]</td>
<td>Inquiries</td>
<td>10-13</td>
</tr>
<tr>
<td>[ii]</td>
<td>Cost Per Retained Case or Matter</td>
<td>10-13</td>
</tr>
<tr>
<td>[iii]</td>
<td>Other Measures</td>
<td>10-13</td>
</tr>
<tr>
<td>[f]</td>
<td>Other Tips for Effective Advertising</td>
<td>10-14</td>
</tr>
<tr>
<td>§ 10.03</td>
<td>Public Relations</td>
<td>10-16</td>
</tr>
<tr>
<td>[1]</td>
<td>Benefits of Public Relations</td>
<td>10-16</td>
</tr>
<tr>
<td>[2]</td>
<td>Media Relations Program</td>
<td>10-17</td>
</tr>
<tr>
<td>[a]</td>
<td>Organizing the Firm</td>
<td>10-18</td>
</tr>
<tr>
<td>[b]</td>
<td>Budgeting</td>
<td>10-18</td>
</tr>
<tr>
<td>[c]</td>
<td>Media Relations Tools</td>
<td>10-18</td>
</tr>
<tr>
<td>[i]</td>
<td>Media List</td>
<td>10-18</td>
</tr>
<tr>
<td>[iii]</td>
<td>Tracking and Evaluating ROI</td>
<td>10-22.1</td>
</tr>
<tr>
<td>[iv]</td>
<td>Press Kit</td>
<td>10-22.1</td>
</tr>
<tr>
<td>[v]</td>
<td>Media Guide</td>
<td>10-22.2</td>
</tr>
<tr>
<td>[vi]</td>
<td>Press Conference</td>
<td>10-22.2</td>
</tr>
<tr>
<td>[vii]</td>
<td>Websites</td>
<td>10-22.2</td>
</tr>
<tr>
<td>[d]</td>
<td>Crisis Management Plan</td>
<td>10-22.2</td>
</tr>
<tr>
<td>[e]</td>
<td>Seven Steps to Media Exposure</td>
<td>10-22.3</td>
</tr>
<tr>
<td>[i]</td>
<td>Make a List of Possible Story Ideas</td>
<td>10-22.3</td>
</tr>
<tr>
<td>[ii]</td>
<td>Target the Media</td>
<td>10-22.5</td>
</tr>
</tbody>
</table>
[iii] Contact the Media .......... 10-22.5
[iv] Follow Up the Release .... 10-22.5
[v] Meet With the Lawyers ....... 10-22.5
[vi] Follow Up the Meeting ....... 10-22.6
[vii] Follow Up the Article ...... 10-22.6

[3] Charitable Contributions and

Sponsorships ..................... 10-22.6
[a] Designing a Process .......... 10-22.6
[b] Creating Policies .............. 10-22.7
[c] Promoting the Firm’s Initiatives .... 10-23
[d] Other Tips ..................... 10-24

§ 10.04 Selecting an Agency ................ 10-25
§ 10.05 Ethical Considerations of Advertising and
Public Relations .................... 10-27

CHAPTER 11

Proposals, Presentations and Interviews for Business

§ 11.01 Introduction ...................... 11-2
§ 11.02 Proposals ......................... 11-4
[1] Organizing Internally ............ 11-4
[a] Assessing the Opportunity ........ 11-5
[b] Researching the Client and the
Firm’s Assets ...................... 11-6
[3] Writing the Proposal ............... 11-7
[a] Content .......................... 11-8
[b] Style and Form ................... 11-10
[c] Packaging the Proposal ......... 11-11
[d] Legal Procurement Professionals .... 11-11
[e] Other Tips for Writing Effective
Proposals .......................... 11-12
[ii] Focus on Solutions ............... 11-12
[ii] Advise References ............... 11-12
[iii] Be Persuasive .................... 11-12
[iv] Be Creative ....................... 11-12
[v] Establish a Budget ............... 11-12.1
[vi] Focus on Substance .............. 11-12.1
[vii] Check the Details ............... 11-12.1
[4] Follow Up .......................... 11-12.1
§ 11.03 Online Auctions ............... 11-13
§ 11.04 Presentations and Interviews ...... 11-14
[1] Before the Interview .......... 11-14
TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>[a]</td>
<td>Selecting the Interview Team</td>
</tr>
<tr>
<td>[b]</td>
<td>Researching the Client</td>
</tr>
<tr>
<td>[c]</td>
<td>Planning a Strategy</td>
</tr>
<tr>
<td>[i]</td>
<td>Content</td>
</tr>
<tr>
<td>[ii]</td>
<td>Format and Materials</td>
</tr>
<tr>
<td>[d]</td>
<td>Rehearsing</td>
</tr>
<tr>
<td>[2]</td>
<td>The Interview or Presentation</td>
</tr>
<tr>
<td>[a]</td>
<td>The Presentation Agenda</td>
</tr>
<tr>
<td>[b]</td>
<td>Other Tips for Effective</td>
</tr>
<tr>
<td>[i]</td>
<td>Check the Order</td>
</tr>
<tr>
<td>[ii]</td>
<td>Consider Audiovisual Aids</td>
</tr>
<tr>
<td>[iii]</td>
<td>Keep Formal Remarks Short</td>
</tr>
<tr>
<td>[iv]</td>
<td>Be Flexible</td>
</tr>
<tr>
<td>[v]</td>
<td>Use Examples and</td>
</tr>
<tr>
<td>[vi]</td>
<td>Avoid Legal Jargon</td>
</tr>
<tr>
<td>[vii]</td>
<td>Use Humor</td>
</tr>
<tr>
<td>[viii]</td>
<td>Be Enthusiastic</td>
</tr>
<tr>
<td>§ 11.05</td>
<td>Other Considerations for Proposals, Presentations, and Interviews</td>
</tr>
</tbody>
</table>

CHAPTER 11A

Pricing and Billing Techniques

§ 11A.01 Introduction                                    11A-2
§ 11A.02 Alternative Fee Arrangements (AFAs)             11A-4
| 1 | Problems with Hourly Billing                          11A-4 |
| 2 | Benefits of Alternative Fee Arrangements              11A-5 |
| 3 | Methods of Alternative Billing                        11A-6 |
| [a] | Variations on Hourly Rates                            11A-6 |
| [i] | Blended Rates                                          11A-6 |
| [ii] | Discounted Fees and Volume Discounts                   11A-7 |
| [b] | Flat or Fixed Fees                                     11A-8 |
| [i] | Flat Fees, Fixed Fees or                              11A-8 |
|     | Segmented Fixed Fees                                   |     |
| [ii] | Budgeted Fees and Caps                                 11A-11 |
| [c] | Retainers                                               11A-12 |
| [d] | Contingency Fees                                       11A-13 |
| [e] | Result-Based or Success Fees                           11A-14 |
MARKETING THE LAW FIRM

[f] Unbundled Services .............. 11A-14
[g] Hybrid Alternative Fee Arrangements .............. 11A-15
[i] Hourly Rates Plus Fixed Fees .................. 11A-15
[ii] Modified Contingency Arrangements .............. 11A-15
[iii] Hourly Rates or Fixed Fees with Minimums, Maximums or Premiums .................. 11A-16
[iv] Outsourced “In-House” Counsel/Secondments ...... 11A-16
[v] Loyalty Programs .................. 11A-17

§ 11A.03 Pricing, Project Management and Procurement Professionals .................. 11A-18
[1] Pricing Professionals .................. 11A-18
[3] Procurement Professionals ............. 11A-21

§ 11A.04 Billing and Invoicing .................. 11A-22

§ 11A.05 Conclusion .................. 11A-24

CHAPTER 11B

Industry Conferences or Trade Shows

§ 11B.01 Introduction .................. 11B-2
§ 11B.02 Evaluating the Opportunity .................. 11B-3

§ 11B.03 Potential Activities .................. 11B-5
[1] Attending the Conference Sessions or Meetings .................. 11B-5
[5] Exhibiting at the Trade Show .................. 11B-6
[6] Integrating the Activities .................. 11B-6

§ 11B.04 Preparing for the Conference or Trade Show .................. 11B-7
[1] Researching the Group/Meeting .................. 11B-7
[a] Membership .................. 11B-7
[b] Attendance .................. 11B-7
[c] Conference Substance .................. 11B-7
[d] Opportunities to Participate .................. 11B-8
[e] Exhibiting Opportunities .................. 11B-8
TABLE OF CONTENTS

  [a] Speakers ..................................... 11B-9
  [b] Exhibitors ...................................... 11B-9
  [c] Attendees ....................................... 11B-11
[4] Preparing a Budget ................................. 11B-11

§ 11B.05 At the Conference or Trade Show ........... 11B-13
[1] Attending Sessions and Functions ............ 11B-13

§ 11B.06 After the Conference or Trade Show .... 11B-15
§ 11B.07 Conclusion .................................. 11B-16

CHAPTER 11C
Websites, Content Marketing and Social Media

§ 11C.01 Introduction .................................. 11C-4
§ 11C.02 Benefits of Online Marketing ............... 11C-6
  [1] Client Acceptance ................................. 11C-6
    [a] Currency ...................................... 11C-6
    [b] Added Value .................................... 11C-6
    [c] Research/Competitive Intelligence .. 11C-7
    [d] Branding and Recruiting .................. 11C-7
    [e] Inquiries, New Business and Profitability ............. 11C-8
    [f] Cost Effectiveness ............................. 11C-8
    [g] Comprehensiveness ............................ 11C-8
    [h] Marketing Applications ....................... 11C-9
    [i] Networking and Listservs ................. 11C-9
    [j] Metrics ......................................... 11C-9
    [k] Internal Communications ..................... 11C-9
    [l] Thought Leadership ............................ 11C-10

§ 11C.03 Websites ..................................... 11C-11
  [1] Content of a Firm Website .................. 11C-12
    [a] Substantive Content .......................... 11C-12
      [i] Newsletters and Client Alerts .............. 11C-12
      [ii] Updates on the Law .................. 11C-12
      [iii] News Feeds/RSS ..................... 11C-13
      [iv] Frequently Asked Questions (FAQs) .. 11C-13
      [v] Checklists, Forms, and Other Documents .... 11C-13
    [vi] Related Resources and Links ............. 11C-14

(Rel. 56)
MARKETING THE LAW FIRM

[vii] Information on Legal Process .................. 11C-14
[b] Firm Information .............................. 11C-14
[i] Description of Firm and
Contact Information ............................ 11C-14
[ii] Practice or Industry Expertise ............. 11C-14
[iii] Offices .................................... 11C-15
[iv] Lawyer Biographies ............................ 11C-15
[v] News or Developments/Press
Releases .................................. 11C-19
[vi] Subscription Forms .......................... 11C-20
[vii] Alumni .................................... 11C-20
[viii] Translation ................................. 11C-20
[ix] Other .................................... 11C-21
[c] Writing for a Website ......................... 11C-21
[d] Search Function .............................. 11C-22

[3] Design and Organization of a Web Site .... 11C-23
[a] Quick Loading Capacity ....................... 11C-24
[b] Easy Navigation ............................... 11C-24
[c] Easy to Read and Printable .................. 11C-25
[d] Visually Interesting ........................... 11C-25
[e] Ease of Contacting the Firm .................. 11C-26
[f] Mobile Sites and Responsive
Design ..................................... 11C-26

[4] Promoting the Website .......................... 11C-27
[a] Addresses on Contact Materials ............. 11C-27
[b] Announcements ................................ 11C-28
[c] Website Directory Listings ................... 11C-28
[d] Pushing Out Content ......................... 11C-28
[e] Incentives to Visit ............................ 11C-28

[a] Site Traffic/Web Analytics .................... 11C-28
[b] Links to the Site ................................ 11C-29
[c] New Business ................................ 11C-29

[6] Other Website Considerations ............... 11C-29
[a] Site Update Responsibility ................. 11C-30
[b] Inquiry Response Time ....................... 11C-30
[c] Copyright Notice ............................ 11C-30
[d] Online Directories Link ....................... 11C-30
[e] Domain Names ................................ 11C-30
[f] Site Collaboration ............................ 11C-31
[g] Privacy Notice ................................ 11C-31
[h] Photography ................................. 11C-31

§ 11C.04 Content Marketing and Internet Technologies .... 11C-32

[1] E-Mail ..................................... 11C-32
<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>[2]</td>
<td>Newsletters or eLetters</td>
<td>11C-33</td>
</tr>
<tr>
<td>[3]</td>
<td>Business Proposals</td>
<td>11C-34</td>
</tr>
<tr>
<td>[4]</td>
<td>Online Legal Matching (OLM)</td>
<td>11C-34</td>
</tr>
<tr>
<td>[5]</td>
<td>Questionnaires and Surveys</td>
<td>11C-35</td>
</tr>
<tr>
<td>[7]</td>
<td>Client Service and Relationship Management</td>
<td>11C-36</td>
</tr>
<tr>
<td>[8]</td>
<td>New Services</td>
<td>11C-37</td>
</tr>
<tr>
<td>[9]</td>
<td>Extranets</td>
<td>11C-37</td>
</tr>
<tr>
<td>[10]</td>
<td>Podcasts</td>
<td>11C-37</td>
</tr>
<tr>
<td>[12]</td>
<td>Video</td>
<td>11C-39</td>
</tr>
<tr>
<td>[14]</td>
<td>Infographics</td>
<td>11C-41</td>
</tr>
<tr>
<td>[15]</td>
<td>Aggregators and Syndicators</td>
<td>11C-41</td>
</tr>
<tr>
<td>§ 11C.05</td>
<td>Social Media</td>
<td>11C-42</td>
</tr>
<tr>
<td>[1]</td>
<td>Listservs or Discussion Forums</td>
<td>11C-42</td>
</tr>
<tr>
<td>[3]</td>
<td>Twitter</td>
<td>11C-45</td>
</tr>
<tr>
<td>[5]</td>
<td>Social Networking</td>
<td>11C-47</td>
</tr>
<tr>
<td>§ 11C.06</td>
<td>Search Engine Optimization</td>
<td>11C-53</td>
</tr>
<tr>
<td>§ 11C.07</td>
<td>Ethical Issues Involved in Online Marketing</td>
<td>11C-57</td>
</tr>
<tr>
<td>[1]</td>
<td>Responding to Inquiries</td>
<td>11C-57</td>
</tr>
<tr>
<td>[2]</td>
<td>Confidentiality</td>
<td>11C-57</td>
</tr>
<tr>
<td>[4]</td>
<td>Lawyer-Client Relationships and Conflicts of Interest</td>
<td>11C-59</td>
</tr>
<tr>
<td>[6]</td>
<td>Client Testimonials or Links</td>
<td>11C-59</td>
</tr>
<tr>
<td>[7]</td>
<td>Domain Names</td>
<td>11C-60</td>
</tr>
<tr>
<td>[8]</td>
<td>Online Reviews</td>
<td>11C-60</td>
</tr>
<tr>
<td>[9]</td>
<td>Social Media Profiles</td>
<td>11C-61</td>
</tr>
<tr>
<td>[10]</td>
<td>Suggestions for Online Communications</td>
<td>11C-61</td>
</tr>
<tr>
<td>[a]</td>
<td>Disclaimers</td>
<td>11C-61</td>
</tr>
<tr>
<td>[b]</td>
<td>Client Permission</td>
<td>11C-61</td>
</tr>
<tr>
<td>[c]</td>
<td>Referral Capability</td>
<td>11C-62</td>
</tr>
<tr>
<td>[d]</td>
<td>Prior Ethics Site Review</td>
<td>11C-62</td>
</tr>
</tbody>
</table>

(Rel. 56)
PART III

CHAPTER 12

Attorney Accountability and Involvement

§ 12.01 The Role of the Lawyer in Marketing ........ 12-2
§ 12.02 Lawyer Marketing and Business Development Training ........................................... 12-3
[2] Areas of Training .................................. 12-4
[3] Forums or Methods of Training ................. 12-6
  [a] Lawyer Involvement ......................... 12-6
  [b] Structuring the Sessions ................... 12-6
  [c] Content of the Curriculum ............... 12-7
  [d] Instructors ................................. 12-8
  [a] Small Group or Peer Group Meetings ................. 12-9
  [b] Regular Firm Meetings .................... 12-9
  [c] Special Marketing Meetings .............. 12-9
  [d] Written Communications ................. 12-9
  [e] Training Checklist .......................... 12-10
[6] Conclusion ........................................ 12-11
§ 12.03 Individual Lawyer Marketing Plans ......... 12-12
  [a] Focusing Efforts ......................... 12-12
  [b] Forcing an Analysis ...................... 12-13
  [c] Committing to a Course of Action ...... 12-13
  [d] Providing a Yardstick for Measurement ................. 12-13
  [a] Situation Analysis ....................... 12-14
  [b] Mission or Vision ....................... 12-15
  [c] Long-Term Goals ....................... 12-15
CHAPTER 13
Management, Coordination and Support of the Marketing Effort

§ 13.01 Introduction ............................................. 13-5

§ 13.02 Responsibility for Marketing Management ........ 13-6
[1] The Role of the Managing Partner/
Management Committee ......................... 13-6
[2] The Role of the Marketing and Business
Development Department ......................... 13-7
[a] Benefits of In-House Marketing
Professionals ................................. 13-8
[b] Titles, Backgrounds, Skills and
Compensation .................................. 13-9
[i] Titles ........................................ 13-9
[ii] Backgrounds and Skills .............. 13-10
[iii] Compensation .......................... 13-10
[c] Areas of Responsibility ..................... 13-11
[i] Advertising ................................. 13-11
[ii] Public/Media Relations .............. 13-11
[iii] Planning ................................. 13-12
[iv] Research/Competitive or
Business Intelligence ..................... 13-12
[v] Internal Communications .............. 13-12
[vi] External Communications .......... 13-12
[vii] Database Management/CRM ....... 13-12
[viii] Business Development ............. 13-13
[ix] Strategy .................................. 13-13
[x] Client Services ......................... 13-13
[xi] Training ................................. 13-13
[xii] Meeting and Event Planning ...... 13-13
[d] Job Descriptions ......................... 13-14
MARKETING THE LAW FIRM

[e] Supervising and Evaluating the Marketer .......................... 13-18.1
[f] Other Marketing Staff .................. 13-21
[i] Traditional Hierarchy ............. 13-21
[iii] Office or Regional Marketers . 13-22
[iv] Practice Group Marketers ...... 13-22
[v] Directors of Strategy or Chief Strategy Officers .......... 13-23
[vi] Conclusion ........................... 13-23
[g] Staffing Structures ................. 13-23
[h] Other Positions ..................... 13-28
[i] Broker/Facilitator ................. 13-28
[ii] Client Ombudsman or Service Center .................. 13-28
[iii] Client Manager ................. 13-29
(iv) Business Development or Sales Professionals ........ 13-29
[v] Director of Pricing .............. 13-30
[i] Marketing Activities Analysis ..... 13-30
[j] Creating Successful Relationships... 13-31
[i] Advice for Law Firms Hiring a Marketing Professional ..... 13-31

[a] Collect Marketing Information .... 13-34
[b] Disseminate Marketing Information .. 13-34
[c] Organize a Firm Database .......... 13-34
[d] Organize Marketing Meetings or Retreats ................. 13-34
[e] Oversee the Firm’s Image ........ 13-34.1
[f] Facilitate Lawyer Marketing Efforts .................. 13-34.1
[g] Monitor the Marketing Budget .... 13-35
[h] Work with the Support Staff ....... 13-35
[i] Hire and Coordinate Outside Resources ................. 13-35


[5] The Role of the Marketing Committee ... 13-36
[a] Composition of the Committee .... 13-36
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibilities of the Committee</td>
<td>13-36.1</td>
</tr>
<tr>
<td>The Role of Consultants and Agencies</td>
<td>13-36.2</td>
</tr>
<tr>
<td>Benefits of Consultants</td>
<td>13-36.2</td>
</tr>
<tr>
<td>Experience</td>
<td>13-36.3</td>
</tr>
<tr>
<td>Creativity</td>
<td>13-36.3</td>
</tr>
<tr>
<td>Specialized Skills</td>
<td>13-36.3</td>
</tr>
<tr>
<td>Objectivity</td>
<td>13-36.3</td>
</tr>
<tr>
<td>Crisis Management</td>
<td>13-36.3</td>
</tr>
<tr>
<td>Complement Existing Staff</td>
<td>13-36.3</td>
</tr>
<tr>
<td>Reduce Nonbillable Time</td>
<td>13-36.4</td>
</tr>
<tr>
<td>Focus Lawyer Attention</td>
<td>13-36.4</td>
</tr>
<tr>
<td>Types of Marketing Consultants and Service Providers</td>
<td>13-36.4</td>
</tr>
<tr>
<td>Using Consultants Effectively</td>
<td>13-36.5</td>
</tr>
<tr>
<td>Determining the Need</td>
<td>13-36.5</td>
</tr>
<tr>
<td>Selecting a Consultant</td>
<td>13-36.5</td>
</tr>
<tr>
<td>Negotiating or Preparing an Agreement</td>
<td>13-36.9</td>
</tr>
<tr>
<td>Preparing for the Consultant</td>
<td>13-36.10</td>
</tr>
<tr>
<td>Working with the Consultant</td>
<td>13-36.10</td>
</tr>
<tr>
<td>Mission Statement</td>
<td>13-36.11</td>
</tr>
<tr>
<td>Meetings</td>
<td>13-36.11</td>
</tr>
<tr>
<td>Marketing Retreats</td>
<td>13-36.11</td>
</tr>
<tr>
<td>Organizing the Agenda</td>
<td>13-37</td>
</tr>
<tr>
<td>Planning Committee</td>
<td>13-37</td>
</tr>
<tr>
<td>Marketing Retreat Objectives</td>
<td>13-37</td>
</tr>
<tr>
<td>Informing the Lawyers</td>
<td>13-39</td>
</tr>
<tr>
<td>Selecting the Site</td>
<td>13-40</td>
</tr>
<tr>
<td>Scheduling the Retreat</td>
<td>13-40</td>
</tr>
<tr>
<td>Length of the Retreat</td>
<td>13-40</td>
</tr>
<tr>
<td>Days of the Retreat</td>
<td>13-40</td>
</tr>
<tr>
<td>Time of Year</td>
<td>13-41</td>
</tr>
<tr>
<td>Selecting the Retreat Participants</td>
<td>13-41</td>
</tr>
<tr>
<td>Running the Retreat</td>
<td>13-42</td>
</tr>
<tr>
<td>Benefits of an Outside Consultant</td>
<td>13-42</td>
</tr>
<tr>
<td>Disadvantages of an Outside Consultant</td>
<td>13-43</td>
</tr>
<tr>
<td>Retreat Follow-Up</td>
<td>13-43</td>
</tr>
<tr>
<td>Conclusion</td>
<td>13-43</td>
</tr>
<tr>
<td>Training and Education</td>
<td>13-44</td>
</tr>
<tr>
<td>The Importance of Support Staff in Marketing</td>
<td>13-44</td>
</tr>
</tbody>
</table>
MARKETING THE LAW FIRM

[b] The Objectives of a Support Staff Marketing Training Program........ 13-45
[c] Areas of Marketing and Client Service Training for Staff........ 13-46
[d] Forums or Methods of Training Support Staff.................. 13-46
[e] Conclusion ................................ 13-47

§ 13.04 Budgeting for Marketing ......................... 13-49
[a] Marketing Plans .............................. 13-52
[b] Activity Budget Projections ............. 13-53
[c] Other Controls and the Tracking of Expenditures ............... 13-53
[6] Conclusion ................................ 13-54

§ 13.05 Rewards and Recognition ......................... 13-59
[a] Major Problems With Existing Systems ................. 13-60
[i] Short-Term Focus ......................... 13-60
[ii] Antithetical to Client Interests ............... 13-60
[iii] Internal Competition .............. 13-61
[b] The Ideal Partner Compensation System .................. 13-61
[c] Administering Partner/Shareholder Compensation ............... 13-63
[a] Partnership Criteria ......................... 13-66
[b] Marketing Time ....................... 13-66
[c] Written Recognition ....................... 13-67
[d] Other Rewards ....................... 13-67
[5] Conclusion ................................ 13-68

§ 13.06 Follow-Up ......................... 13-69
[1] Why Follow-Up is Difficult ............... 13-69
TABLE OF CONTENTS

   [a] Use Marketing Tools .......... 13-70
   [b] Use the CRM or Database .... 13-70
   [c] Track Contacts ................. 13-70
   [d] Identify Follow-Up Activities Early... 13-71
   [e] Write Plans .................... 13-71
   [f] Use a Docket or Calendar ..... 13-71
   [g] Circulate Reports ............. 13-71

PART IV

CHAPTER 13A
Marketing the Small Law Firm

§ 13A.01 Introduction ....................... 13A-1
§ 13A.02 Advantages to Marketing a Small Firm .... 13A-3
§ 13A.03 Disadvantages to Marketing a Small Firm ..... 13A-4
§ 13A.04 Developing a Perception of Expertise. .... 13A-5
§ 13A.05 The Steps to Marketing a Small Firm ..... 13A-7
§ 13A.06 Recommended Activities for Small Firms ... 13A-8
      [a] External Market Intelligence ... 13A-8
      [b] Internal Market Intelligence ... 13A-8
   [2] Continual Communications ....... 13A-9
      and Web Site ..................... 13A-9
   [8] Promotional Activities .......... 13A-12
   [9] Networks and Networking ........ 13A-12
§ 13A.07 Costs of Marketing Activities ............. 13A-14
§ 13A.08 Conclusion and Advice to Small Law Firms .. 13A-15

CHAPTER 13B
Marketing a New Capability or Office

§ 13B.01 Introduction ....................... 13B-2
§ 13B.02 Internal Activities .............. 13B-3
   [1] Information Collection ........... 13B-3
# MARKETING THE LAW FIRM

## § 13B.03 External Activities

<table>
<thead>
<tr>
<th>§ 13B.03 External Activities</th>
<th>13B-8</th>
</tr>
</thead>
<tbody>
<tr>
<td>[1] Written Communications</td>
<td></td>
</tr>
<tr>
<td>[a] Press Releases and Advertisements</td>
<td>13B-8</td>
</tr>
<tr>
<td>[b] Announcements</td>
<td>13B-8</td>
</tr>
<tr>
<td>[c] Newsletters</td>
<td>13B-8</td>
</tr>
<tr>
<td>[d] Practice Description</td>
<td>13B-9</td>
</tr>
<tr>
<td>[e] Directories</td>
<td>13B-9</td>
</tr>
<tr>
<td>[f] Miscellaneous</td>
<td>13B-9</td>
</tr>
<tr>
<td>[2] Face-to-Face Communications</td>
<td>13B-9</td>
</tr>
<tr>
<td>[a] Open Houses/Receptions</td>
<td>13B-9</td>
</tr>
<tr>
<td>[b] Client Meetings, Workshops and Seminars</td>
<td>13B-9</td>
</tr>
<tr>
<td>[c] Community Meetings</td>
<td>13B-10</td>
</tr>
</tbody>
</table>

## § 13B.04 Conclusion

### CHAPTER 13C

**Creating an “Alumni” Relations Program**

| § 13C.01 Introduction         | 13C-1 |
| § 13C.02 Potential Opportunities Which Alumni Bring | 13C-2 |
| § 13C.03 Establishing an Alumni Relations Program | 13C-3 |
| § 13C.04 Selecting Appropriate Activities | 13C-5 |
| § 13C.05 Conclusion            | 13C-7 |

## CHAPTER 13D

**Cross-Selling Your Firm’s Services**

| § 13D.01 Introduction         | 13D-1 |
TABLE OF CONTENTS

§ 13D.02 Obstacles to Cross-Selling .......................... 13D-3
§ 13D.03 Cross-Selling Activities ............................. 13D-5
      [a] Internal Activities .................. 13D-5
          [i] Intranets and Internal Newsletters .......... 13D-5
          [ii] Emails and Memoranda ............... 13D-5
          [iii] Minutes of Meetings/Plans ....... 13D-5
          [iv] Internal Seminars/Webinars ....... 13D-6
          [v] Meetings .................. 13D-6
          [vi] Databases or Information That Support(s) Cross-Selling .... 13D-6
          [vii] Client Teams ................. 13D-7
      [b] External Activities .................. 13D-7
          [i] Websites and Other Materials ............ 13D-7
          [ii] Seminars and Programs .......... 13D-7
          [iii] Newsletters and Electronic Communications .... 13D-8
          [iv] Client Surveys ................... 13D-8
          [v] Client Workshops and Training ........ 13D-8
  [2] Individual Cross-Selling Activities ............ 13D-8
§ 13D.04 Conclusion ........................................ 13D-10

CHAPTER 13E

Service Quality as a Marketing Strategy

§ 13E.01 Introduction ........................................ 13E-2
§ 13E.02 Elements of a Quality Program ................. 13E-4
  [1] Continuous Improvement .................. 13E-4
  [2] Involvement of All Professionals and Employees .................. 13E-4
  [3] Leadership and Commitment from the Top ................. 13E-4
  [4] Client Focus ................................ 13E-4
  [5] Process and System Focus ................ 13E-4
§ 13E.03 How Service Quality Is Defined by Clients .... 13E-6
  [1] Components of Service Quality ................. 13E-6
      [a] Leadership ................................ 13E-7
      [b] Information and Analysis ............ 13E-8
      [c] Strategic Quality Planning ........... 13E-8
[e] Management of Process Quality .................. 13E-8
[f] Quality and Operation Results .................. 13E-9
[g] Client Focus and Satisfaction .................. 13E-9

§ 13E.04 Quality Checkpoints in a Law Firm .................. 13E-10
[1] Personnel (Attorneys and Staff) .................. 13E-10

§ 13E.05 Beginning Quality Initiatives in a Law Firm ........ 13E-12
[1] Client Involvement .................. 13E-12
[4] Involvement of All Personnel .................. 13E-13

§ 13E.06 Conclusion .................. 13E-15

CHAPTER 13F
Client Service Strategies

§ 13F.01 Introduction .................. 13F-2
§ 13F.02 The Importance of Existing Clients ........ 13F-3
§ 13F.03 Client Perceptions of Counsel ........ 13F-4
[1] Good Clients Often Feel Taken For
   Granted .................. 13F-4
[2] Client Perceptions Are Reality for
   Clients .................. 13F-4
[3] Clients’ Views of the “Firm” Are Based
   on the Individuals With Whom
   They Deal .................. 13F-4
   Than Fees .................. 13F-5

§ 13F.04 Improving Client Service as a Firm ........ 13F-6
[1] Build Relationships Around Key
   Clients .................. 13F-6
   [a] Delineate the Client Service Team
       and Responsible Attorney .................. 13F-7
       [i] Hold Internal Meetings .................. 13F-7
       [ii] Organize Information .................. 13F-8
       [iii] Orient People Newly Assigned
            to the Client .................. 13F-8
       [iv] Develop Team Roles .................. 13F-8
## TABLE OF CONTENTS

[b] Brainstorm Activities to Recognize and Reward Clients ............ 13F-9
[i] Establish Special Programs for Key Clients ..................... 13F-9
[ii] Identify Activities to Introduce Other Services and People to the Client .............. 13F-9
[iii] Provide Educational Programs .......................... 13F-9
[iv] Organize a Client Action Plan. . . . . 13F-9
[2] Orient, Train and Reward People in Client Service Areas ............... 13F-10
[a] Recruiting ........................................ 13F-10
[b] Orientations ..................................... 13F-11
[c] Training .......................................... 13F-11
[d] Recognize and Reward Good Client Service ..................... 13F-11
[3] Implement Client Feedback Programs .......................... 13F-12
[a] Client Surveys .................................... 13F-12
[b] End-of-Matter Reviews ................................ 13F-12
[c] Initial Intake Meetings ............................... 13F-13
[d] Client Advisory Boards ................................ 13F-14
[e] Client Focus Groups ................................ 13F-15
[f] Client Speakers .................................... 13F-15
[g] Exit Interviews ..................................... 13F-16
[4] Be Good at Resolving Client Complaints ......................... 13F-16
[a] Response Plan ...................................... 13F-17
[b] Authority .......................................... 13F-17
[c] Follow Up .......................................... 13F-17
[a] Good, Clear, Timely Invoices ....................... 13F-18
[b] Accessibility ..................................... 13F-18
[c] Communications .................................. 13F-19
[d] Office Space ....................................... 13F-19
[e] Soliciting Ideas for Client-Service Improvements From All Personnel ..................... 13F-19
[a] Providing Seminars and Workshops ......................... 13F-20
[b] Issuing Substantive Materials ......................... 13F-20
[c] Acquiring Business/Industry Knowledge ..................... 13F-20

(Rel. 56)
CHAPTER 13G

Law Firm Networks

§ 13G.01 Introduction ............................................. 13G-2
§ 13G.02 Types of Networks and Alliances .................. 13G-3
§ 13G.03 Purposes of Law Firm Networks ............... 13G-5
  [5] Sharing Resources ................................. 13G-6
§ 13G.04 Considerations in Forming or Joining a Network or Alliance ............... 13G-7
  [1] Formality and Size .................................. 13G-7
  [5] Role of Member Firms and Individuals ........... 13G-9
§ 13G.05 Marketing the Network or Alliance ............... 13G-11
      [a] Lists of Members ................................. 13G-11
      [b] Communications .................................. 13G-11
      [c] Meetings ....................................... 13G-11
      [d] Information Exchange ........................... 13G-12
      [a] Branding ....................................... 13G-12
      [b] Advertisements ................................. 13G-12
      [c] Videos ......................................... 13G-12
      [d] Materials ...................................... 13G-12
      [e] Thought Leadership ............................... 13G-12
      [g] Proposals ...................................... 13G-13
      [h] Trade Shows .................................... 13G-13
§ 13G.06 Measuring the Impact ..................... 13G-14
§ 13G.07 Conclusion ............................................. 13G-15
TABLE OF CONTENTS

PART V

CHAPTER 14

Conclusion

§ 14.01 The Future of the Legal Practice ............... 14-2
[2] Continued Development of Networks
    and Associations ........................................ 14-3
[3] Competition From Other Professionals ............. 14-3
[4] Diversification ............................................. 14-4
    [a] Nonlegal Services ..................................... 14-4
    [b] Nonlegal Personnel .................................. 14-5
    [c] Issues to Consider in
        Diversification ........................................ 14-5
[5] Branching ...................................................... 14-6
[6] Methods to Add Value or Price
    Services .......................................................... 14-6
    [a] Adding Value ............................................. 14-6
    [b] Pricing Alternatives .................................... 14-7
[7] Productizing and Packaging Services ............... 14-7
[8] Continued Pressure by Clients ...................... 14-7
[9] Outsourcing ..................................................... 14-8
[10] Niche Marketing ............................................. 14-8
    Marketing Departments ................................. 14-9

§ 14.02 Advice to Law Firms in Their Marketing
    Efforts ........................................................... 14-10
[1] Develop a Market-driven Culture ................... 14-10
[2] Plan and Focus ................................................. 14-10
[5] Educate and Communicate ............................... 14-11
[8] Position the Firm ............................................ 14-12
[9] Focus on Quality ............................................. 14-12
[10] Be Creative .................................................... 14-12

§ 14.03 Concluding Comment ............................... 14-13

APPENDIX A: Law Firm Marketing Resources ............ A-1
INDEX ............................................................. I-1