# TABLE OF CONTENTS

Preface	PART I	v
	CHAPTER 1	
	Overview of Marketing in a Law Firm	
§ 1.01	The Changing Environment	1-2 1-2 1-2
	[b] Non-Lawyer Competition and Investment	1-3
	[c] Legal Process Outsourcing (LPO) [d] "Do-it-yourself" (DIY) Options	1-5 1-6
	[2] Client Changes	1-6 1-7
	[b] Client Demands	1-7
	[3] Firm Size and Economics	1-9 1-10
§ 1.02	[5] Conclusion	1-11 1-12
3 1102	[1] The Marketing Concept	1-12
	[2] The Components of Marketing	1-13 1-13
	[b] "Price"	1-14
	[c] "Place"	1-15 1-16
	[d] "Promotion"	1-10
§ 1.03	A Client's View of the Law Firm	1-19
	[1] Quality	1-19 1-20
§ 1.04	[2] Client's Evaluations of Legal Services The Marketing Process	1-20
0	[1] Research	1-22
	[a] Primary Research	1-22 1-23
	[2] Segmentation	1-23

X	MARKETING THE LAW FIRM	
	[3] Positioning or Branding	1-25 1-26
	[a] Internal Marketing	1-26
	[b] External Marketing	1-26
§ 1.05	[5] Measurement and Control	1-26 1-29
	CHAPTER 2	
	The Obstacles to Marketing in a Law Firm	
§ 2.01	Introduction	2-2
§ 2.02	Intangibility	2-3
	[1] The Negative Impact of Intangibility	2-3
	[2] Dealing with the Problem	2-3
	[a] Tangible Products and Qualities	2-4
	[b] Measurement	2-4
§ 2.03	Management and Administration	2-5
	[1] The Negative Impact of Current	2.5
	Management Practices	2-5
	[2] Dealing With the Problem	2-6
	[a] Leadership and Management  Qualities	2-6
	[b] Committees	2-0
	[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
	[1] The Negative Impact of Poor Information	
	Systems	2-13
	[2] Dealing with the Problem	2-14
	[a] Maintaining and Analyzing	
	Information	2-14
0.000	[b] Reporting Information	2-15
§ 2.06	Production Orientation	2-17
	[1] The Negative Impact of a Production	2 17
	Orientation	2-17

	TABLE OF CONTENTS	xi
	[2] Dealing with the Problem	2-18 2-18 2-20
	[c] Value-Based Billing	2-20
§ 2.07	Ethical Restrictions	2-22
	Restrictions	2-22
	[2] Dealing with the Problem	2-23
§ 2.08	Conclusion	2-24
	CHAPTER 3	
	<b>Marketing Analysis and Planning</b>	
§ 3.01	Planning in the Law Firm	3-2
	[1] Benefits of Planning	3-2
	[2] Why Law Firms Do Not Plan	3-3
	[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
	[4] A Mission or Vision	3-6
	[5] Marketing Planning Without a Firm-Wide	
	Approach	3-6
	[a] Conflicting Directions	3-7
	[b] Limited Resources	3-7
	[c] Public Perceptions	3-7
	[d] Jealousy or Internal Competition	3-8
	[e] Lack of Control or Judgment	3-8
§ 3.02	The Marketing Planning Process	3-8.1
	[1] Planning Levels	3-8.1
	[a] Firm-Wide Plans	3-8.1
	[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
	[3] The Process	3-10
	[a] Research and Analysis	3-10
	[i] Internal Analysis: Lawyer	
	Perceptions	3-11

xii	MARKETING THE LAW FIRM	
0.2.02	[ii] Internal Analysis: Statistical Information. [iii] External Analysis. [iv] Situation Analysis.  [b] Segmentation. [c] Identifying Planning Units. [i] Practice Area Marketing Planning. [ii] Industry/Niche Marketing Planning.  [d] Situation Analysis. [e] Goals and Objectives. [f] Strategies and Activities. [g] Action Plan. [h] Implementation and Evaluation.	3-12 3-13 3-13 3-14 3-16 3-17 3-18 3-19 3-21 3-23 3-27 3-27
§ 3.03	Conclusion	3-28
	PART II	
	CHAPTER 4	
De	eveloping and Implementing a Law Firm Brai	nd
\$ 4.01 \$ 4.02 \$ 4.03 \$ 4.04	Introduction	4-2 4-3 4-4 4-6 4-6
§ 4.05	Management.  [3] Short-Term Time Horizon  [4] Historical Complacency  [5] Intangibility  [6] Names  [7] Ethical Restrictions  Developing a Law Firm Brand  [1] Internal Analysis  [2] External Analysis	4-6 4-7 4-7 4-7 4-8 4-9 4-9
	[2] External Thichysis [3] Vision or Positioning Statement. [4] Living the Brand. [a] Name. [b] Graphic Representations. [c] Tagline. [d] Marketing Activities.	4-10 4-11 4-11 4-12 4-12 4-13

	TABLE OF CONTENTS	xiii
§ 4.06	[e] Personnel         [f] Offices         [g] Procedures or Policies         Conclusion	4-13 4-14 4-14 4-15
	CHAPTER 4A	
	Selecting Marketing Strategies and	
	<b>Ethical Considerations</b>	
	Introduction	4A-2 4A-4 4A-4
	[2] External Marketing Activities	4A-4
	[3] Selecting an Activity	4A-4 4A-5
	<ul><li>[b] Who Is the Firm Trying to Reach?</li><li>[c] What Does the Firm Want to</li></ul>	4A-5
	Communicate?	4A-5
	Medium?[e] How Will the Firm Evaluate the	4A-6
	Activity?[f] How Will the Firm Follow Up?	4A-6 4A-7
§ 4A.03		<b>TA-</b> /
Ü	Investment	4A-8
	[1] The Measurement Process	4A-9
	[a] Establishing Objectives	4A-9
	[b] Setting Benchmarks	4A-11
	[c] Tracking and Measuring	4A-12
	[2] Examples in Measuring ROI	4A-12 4A-12
	[b] Proposals	4A-12 4A-13
	[c] Client Satisfaction Program	4A-13
	[d] Seminar	4A-13
	[3] Case Study in Measuring ROI	4A-13
	[4] Conclusion	4A-14
§ 4A.04	Ethical Considerations	4A-15
3	[1] Significant Decisions	4A-15
	[a] Bates	4A-15
	[b] Zauderer	4A-16
	[c] Shapero	4A-16
	[d] Peel v. Attorney Disciplinary	
	Commission of Illinois	4A-16
	[e] Went For It, Inc	4A-16

	[2]	Highlights of Ethical Constraints [a] Misleading and Deceptive	4A-17
		Advertising and Testimonials	4A-17
		[b] Solicitation	4A-17
		[c] "Specialist" or "Expert"	4A-18
		[d] Confidential Information	4A-18
	[3]	Practical Implications of Ethical Rules	4A-18
	[-]	[a] Direct Communications	4A-18
		[b] Testimonials and Past Results	4A-19
		[c] Email and Text Messages	4A-20
		[d] Advertising	4A-21
		[e] Written Materials	4A-22
		[f] Proposals and Presentations for Business	4A-22
		[g] Newsletters, Substantive Briefings	
		and Alerts	4A-22
		[h] Websites and Domain Names	4A-22
		[i] Case Studies and Client Matters	4A-24
		[j] Seminars and Webinars	4A-24
		[k] Ratings and Directories	4A-25
		[1] Taglines, Trade Names and Logos [m] Referral Services/Lead-generation	4A-25
		Sites	4A-26
		[n] Photographs and Video	4A-27
		[o] Social Media and Outside Websites	4A-27
		[p] Blogs and Twitter	4A-30
		[q] Outsourcing	4A-30
		[r] Non-lawyer Ownership and	
		Fee Sharing	4A-31
		[s] Alternative Fee Arrangements	
		(AFAs)	4A-31
		[t] Technological Competence	4A-31
	[4]	Conclusion	4A-32
		CHAPTER 5	
Client	Rela	ntionship Management, Enterprise Rela	tionship
		ement and Experience Management Sys	_
5.01		oduction	5-2
5.02		ent Relationship Management (CRM) nd Enterprise Relationship Management	
		ERM) Systems	5-4
	[1]	7 · · · · · · · · · · · · · · · · · · ·	5-4 5-4
	Γ <sub>1</sub> ]	[a] Identifying and Leveraging	J- <del>4</del>
		Relationships	5-5
		Keianonsinps	5-3

TABLE OF CONTENTS			XV
		[b] Immediate Access	5-5
		[c] Contact Information and Recor	
		[d] Data Mining	
		[e] More Effective and Cost-Effec	
		Marketing	
	[2]	Needs and Considerations in Develo	
	[-]	a CRM or ERM System	
		[a] Sensitivity to Sharing Informat	
		[b] Ease of Use	
		[c] Accessibility and Compatibility	
		[d] Ability to Integrate Client Fina	
		Records	
		[e] Who Has Access	
		[f] Who Maintains the System	
	[3]	Getting Started	
	[2]	[a] Evaluate Information Needs	
		[b] Evaluating the Options	
		[c] Collecting Information and	
		Populating the CRM	5-12
		[i] New Matter/Client Intake	
		Process	
		[ii] Support Staff	
		[iii] Update Requests	
	[4]	Examples of Uses and Reports	
	Γ.1	[a] Client and Practice Area	
		Contributions	5-13
		[b] Top Clients	
		[c] Cross Selling Analysis	
		[d] Industry/Type of Company	
		Analysis	5-15
		[e] Lists and Marketing Activities.	5-15
	[5]	Other Considerations	5-16
	r. 1	[a] Integrating CRM With	
		Other Systems	5-17
		[b] CRM Success Strategies	
§ 5.03	Inter	nal Information Collection and	
0		anagement	5-18.1
	[1]	Benefits of Collecting and Managing	
	LJ	Internal Information	
		[a] Improving Client Service	
		[b] Organizing Experience and Bu	
		Development Efforts	
	[2]	Information of Interest and Uses of	
		Internal Data	5-19
		[a] Lawyer and Staff Information.	
		[b] Other Marketing Related	
		Information	5-20

xvi	MARKETING THE LAW FIRM	
	[3] Organizing and Using Internal	
	Information	5-20.1
e <b>5</b> 04	[4] Other Considerations	5-20.1
§ 5.04	Measuring the ROI of a CRM or ERM System	5-21
§ 5.05	Conclusion	5-22
	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 6-4
	[3] Practice/Industry Capability Pieces [4] Lawyer Biographies	6-5
	[5] Client References.	6-5
	[6] Annual Reports	6-5
	[7] History Books	6-5
§ 6.04	Preparing Effective Collateral Materials	6-7
O	[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
	[2] Overcome Objections	6-9
	[3] Organize the Copy Well	6-10
	[4] Call the Reader to Action	6-10
	[5] Stress Benefits, Not Features	6-10
§ 6.06	[6] Other Suggestions	6-10 6-12
8 0.00	[1] Design	6-12
	[2] Printing and Production	6-13
	[3] Digital Materials	6-14
§ 6.07	Using the Final Products	6-15
0,	[1] Passive Circulation	6-15
	[2] In Conjunction With Other Activities	6-15
	[3] Copies for Firm Representatives	6-15

		TABLE OF CONTENTS	xvii
§ 6.08	[5] In [6] To [7] To [8] Eas	a Follow-Up Device	6-15 6-15 6-16 6-16 6-17
		CHAPTER 7	
	;	Substantive Publications and	
	(	Other Client Communications	
§ 7.01 § 7.02	Substant [1] Ber [2] Dis [3] De [a] [b] [c] [d] [e]  [f]  [g]	Targeting the Audience Copy and Content. Format and Frequency Design and Layout  [i] Hard-copy Publications [ii] Electronic Publications Producing and Delivering the Material.  [i] Hard-Copy Publications  [ii] Electronic Publications  [ii] Electronic Publications  Evaluating the ROI of a Publication.  [ii] Tracking  [iii] Prompting Inquiries  [iii] Survey  her Ideas and Issues  Index or Archive.  Copyrighting  Inquiries  Leverage  Bylines	7-2 7-3 7-3 7-4 7-4 7-5 7-5 7-6 7-8 7-9 7-9 7-10 7-11 7-13 7-14 7-14 7-16 7-16 7-16 7-16 7-16 7-16
	[f] [g] [h] [i]	Caveat	7-17 7-17 7-17 7-17 7-17

xviii	MARKETING THE LAW FIRM	
	[k] Soliciting Names	7-17
	[l] Website	7-18
	[m] Social Media	7-18
§ 7.03	Announcements, Invitations and Other	
	Communications	7-19
	[1] Announcements	7-19
0.7.04	[2] Invitations and Other Communications	7-19
§ 7.04	Direct Mail or E-mail Marketing	7-20
	[1] Writing and Design Considerations	7-20 7-21
	[2] Developing the Distribution List	7-21
§ 7.05	[3] Measurement and Follow-Up	7-21
g 7.03	Conclusion	7-23
	CHAPTER 8	
	Market Research and Intelligence	
§ 8.01	Introduction	8-2
O	[1] Gathering Information	8-4
	[2] Sources of Kinds of Data	8-5
	[3] Designing a Research Project	8-6
	[4] Conducting the Research	8-7
	[a] Data Collection	8-8
	[b] Data Sources	8-8
	[c] Manipulating the Information	
	(Experimentation)	8-10
	[5] Analyzing the Data	8-10
§ 8.02	Client Feedback Programs	8-11
	[1] Benefits of Client Feedback	8-11
	[a] Fostering Goodwill	8-12
	[b] Uncovering Problems or Concerns	8-12
	[c] Discovering New Business or Service Opportunities	8-13
	[d] Assessing Client Knowledge or	
	Perceptions of the Firm, Its	
	Visibility or Its Image	8-13
	[e] Determining Goals or Areas of	
	Emphasis for the Firm's Overall	
	Marketing Efforts	8-13
	[f] Assessing Client Loyalty	8-14
	[g] Improving Client Retention	8-14

	TABLE OF CONTENTS	xix
	<ul><li>[2] Obstacles to Client Feedback Programs</li><li>[3] Areas to Explore</li></ul>	8-14 8-15
	[a] Assessing Client Knowledge of Services, Including Capabilities	
	and Office Locations [b] Determining What Characteristics of	8-15
	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
0.000	[4] Feedback Procedures	8-17
§ 8.03	Market Research Techniques	8-20
	[1] Written/Electronic Survey	8-20
	[2] Telephone Survey	8-23
	[3] Personal Interview	8-23
	[4] Focus Group	8-23
	[5] Selecting the Research Method	8-24
0.004	[6] The Cost of Research	8-25
§ 8.04	Writing an Effective Questionnaire	8-26
	[1] Types of Questions	8-26
	[2] Qualitative vs. Quantitative Responses	8-27
§ 8.05	[3] Sequence of Questions  Other Market Research Applications	8-28 8-29
8 8.03	[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
	[.]	

## MARKETING THE LAW FIRM

## **CHAPTER 9**

## **Substantive Programs and Client Entertainment**

§ 9.01	Introducti	ion	9-2
§ 9.02		ve Programs	9-3
Ü		efits and Caveats	9-3
		ning an Effective Program	9-4
	[a]	Organizing for Planning	9-4
	[b]	Planning the Program	9-5
		[i] Who Is the Firm Trying to	
		Reach?	9-6
		[ii] How Many of These People	
		Exist?	9-6
		[iii] How Can These People Be	
		Identified?	9-6
		[iv] What Is in It for the	, ,
		Audience?	9-6
		[v] What Competition Exists?	9-10
		[vi] How Many Attendees Are	<i>y</i> 10
		Desired?	9-10
		[vii] What Will the Format Be?	9-10
		[viii] How Formal Will the Program	<i>J</i> -10
		Be?	9-11
		[ix] Will the Program Be	<i>y</i> -11
		Co-Sponsored?	9-11
		[x] Who Will the Speakers Be?	9-11
		[xi] When and How Long Will the	9-11
			9-12
		Program Be?	9-12
		[xii] Where Will the Program Be	0.12
		Held?	9-12
		[xiii] How Will the Program Be	0.12
		Communicated? [xiv] How Will the Program Be	9-12
		Evaluated?	9-13
		[xv] How Will the Firm Follow Up	9-13
		With Attendees?	9-13
		[xvi] What Is the Program's	9-13
		Budget?	9-15
	[c]	Organizing the Program	9-17
§ 9.03		tertainment	9-26
y 7.03		nts	9-26
		1 Anniversaries	9-28
	[2] I IIII	Parties and Special Events	9-29
	[b]	Gifts or Mementos	9-29
	[c]	Histories	9-30
	[~]	1110/01100	, 50

			TABLE OF CONTENTS	xxi
		[d]	Announcements	9-30
		[e]	Themes and Tag Lines	9-30
		[f]	Media and Publicity	9-30
	[3]	Tick	tets and Suites	9-31
			CHAPTER 10	
		Adv	vertising and Public Relations	
§ 10.01	Intro	ducti	on	10-2
§ 10.02			ng	10-3
0	[1]		rview of Lawyer Advertising	10-3
	[2]		s to Effective Advertising	10-4
		[a]	Identifying the Objectives	10-4
		[b]	Defining the Audience	10-4
		[c]	Determining the Message	10-5
		[d]	Selecting the Media	10-5
			[i] Television	10-6
			[ii] Radio	10-7
			[iii] Publications	10-7
			[iv] Yellow Pages	10-8
			[v] Directories and Ranking	10.10
			Services	10-10 10-12
		[e]	[vi] Underwriting or Sponsorship Measuring the Return on	10-12
		[c]	Investment	10-12
			[i] Inquiries	10-12
			[ii] Cost Per Retained Case	10 13
			or Matter	10-13
			[iii] Other Measures	10-13
		[f]	Other Tips for Effective	
			Advertising	10-14
§ 10.03	Publ	ic Re	elations	10-16
	[1]	Ben	efits of Public Relations	10-16
	[2]	Med	lia Relations Program	10-17
			Organizing the Firm	10-18
		[b]	Budgeting	10-18
		[c]	Media Relations Tools	10-18
			[i] Media List	10-18
			[ii] The Press Release	10-19
			[iii] Tracking and Evaluating ROI	10-23
			[iv] Press Kit	10-23
			[v] Media Guide	10-24
			[vi] Press Conference	10-24
			[vii] Web sites	10-24
		[d]	Crisis Management Plan	10-24

xxii	MARKETING THE LAW FIRM	
	[e] Seven Steps to Media Exposure [i] Make a List of Possible Story	10-25
	Ideas	10-25
	[ii] Target the Media	10-27
	[iii] Contact the Media	10-27
	[iv] Follow Up the Release	10-27
	[v] Meet With the Lawyers	10-27
	[vi] Follow Up the Meeting	10-28
	[vii] Follow Up the Article [3] Charitable Contributions and	10-28
	Sponsorships	10-28
	[a] Designing a Process	10-28
	[b] Creating Policies	10-29
	[c] Promoting the Firm's Initiatives	10-30
	[d] Other Tips	10-31
	[4] Litigation Public Relations	10-31
§ 10.04	Selecting an Agency	10-33
§ 10.05	Ethical Considerations of Advertising and	
	Public Relations	10-35
	[1] Rules of Professional Conduct	10-35
	[2] Privileged Communications	10-35
	CHAPTER 11	
Proj	posals, Presentations and Interviews for Bus	siness
§ 11.01	Introduction	11-2
§ 11.01	Proposals	11-4
3 11.02	[1] Organizing Internally	11-4
	[2] Researching	11-5
	[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
	[i] 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

	TABLE OF CONTENTS	xxiii
§ 11.03 § 11.04	[vi] Focus on Substance [vii] Check the Details.  [4] Follow Up  [5] Conclusion: Proposals  Online Auctions  Presentations and Interviews  [1] Before the Interview  [a] Selecting the Interview Team  [b] Researching the Client  [c] Planning a Strategy.  [i] Content  [ii] Format and Materials.  [d] Rehearsing.	11-12.1 11-12.1 11-12.2 11-13 11-14 11-14 11-15 11-15 11-15 11-16
	[2] The Interview or Presentation  [a] The Presentation Agenda  [b] Other Tips for Effective  Presentations  [i] Check the Order  [ii] Consider Audiovisual Aids	11-16 11-16 11-17 11-17
	Carefully  [iii] Keep Formal Remarks Short  [iv] Be Flexible  [v] Use Examples and	11-18 11-18 11-18
0.11.05	Representative Cases	11-18 11-18 11-18 11-18 11-19
§ 11.05	Other Considerations for Proposals, Presentations, and Interviews	11-20
	CHAPTER 11A	
	Pricing and Billing Techniques	
	Introduction  Alternative Fee Arrangements (AFAs)  [1] Problems with Hourly Billing  [2] Benefits of Alternative Fee Arrangements  [3] Methods of Alternative Billing  [a] Variations on Hourly Rates  [i] Blended Rates  [ii] Discounted Fees and Volume Discounts	11A-2 11A-4 11A-5 11A-6 11A-6 11A-6

xxiv	MARKETING THE LAW FIRM	
[b	Flat or Fixed Fees	11A-9
	[i] Flat Fees, Fixed Fees or	
	Segmented Fixed Fees	11A-9
	[ii] Budgeted Fees and Caps	11A-11
[c		11A-12
[d	- • •	11A-13
[e	-	11A-14
[f	-	11A-14
[g		11A-15
	Arrangements	
	Fees[ii] Modified Contingency	11A-15
	Arrangements	11A-15
	[iii] Hourly Rates or Fixed Fees	
	with Minimums, Maximums	
	or Premiums	11A-16
	[iv] Outsourced "In-House"	
	Counsel/Secondments	11A-16
0 11 4 02 B : :	[v] Loyalty Programs	11A-17
	, Project Management and	11 4 10
	surement Professionals	11A-18
	ricing Professionals	11A-18
	roject Management Professionals	11A-19
	rocurement Professionals and Invoicing	11A-21 11A-22
	sion	11A-22 11A-24
g 11A.03 Colletu	SIOII	11A-24
	CHAPTER 11B	
Indu	ustry Conferences or Trade Shows	
8 11B 01 Introdu	ection	11B-2
	ting the Opportunity	11B-3
	Taking a Strategic Decision	11B-3
	stablishing Objectives	11B-3
	al Activities	11B-5
0	ttending the Conference Sessions	
[-] 11	or Meetings	11B-5
[2] S <sub>1</sub>	peaking at the Conference	11B-5
	dvertising in Conference Materials	11B-5
	ponsoring the Conference, an Event, or	
	a Giveaway	11B-5
[5] E:	xhibiting at the Trade Show	11B-6
[6] In	tegrating the Activities	11B-6

TABLE OF CONTENTS	XXV
§ 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
[2] Establishing Objectives	11B-8
[3] Preparing for the Conference	11B-9
[a] Speakers	11B <b>-</b> 9
[b] Exhibitors	11B-9
[c] Attendees	11B-11
[4] Preparing a Budget	11B-11
[5] Alerting Contacts	11B-12
§ 11B.05 At the Conference or Trade Show	11B-13
[1] Attending Sessions and Functions	11B-13
[2] Exhibiting	11B-13
§ 11B.06 After the Conference or Trade Show	11B-15
§ 11B.07 Conclusion	11B-16
CHAPTER 11C	
Digital Marketing	
§ 11C.01 Introduction	11C-4
§ 11C.02 Benefits of Digital Marketing	11C-8
[1] Client Acceptance	11C-8
[2] Marketing Advantages for Law Firms	11C-8
[a] Currency	11C-8
[b] Added Value	11C-8
[c] Research/Competitive Intelligence	11C-9
[d] Branding and Recruiting	11C-9
[e] Inquiries, New Business and	
Profitability	11C-10
[f] Cost Effectiveness	11C-10
[g] Comprehensiveness	11C-10
[h] Marketing Applications	11C-10
[i] Networking and Listservs	11C-10
[j] Metrics	11C-11 11C-11
L 3	11C-11 11C-11
[l] Thought Leadership	11C-11 11C-11
§ 11C.03 Websites	11C-11 11C-12
[1] Content of a Firm Website	11C-12 11C-13
[-]	

### MARKETING THE LAW FIRM

	[a]	Substantive Content	11C-13
		[i] Newsletters and Client Alerts	11C-13
		[ii] Updates on the Law	11C-13
		[iii] News Feeds/RSS	11C-14
		[iv] Frequently Asked Questions	
		(FAQs)	11C-14
		[v] Checklists, Forms, and Other	
		Documents	11C-14
		[vi] Related Resources and Links	11C-15
		[vii] Information on Legal Process	11C-15
	[b]	Firm Information	11C-15
		[i] Description of Firm and	
		Contact Information	11C-15
		[ii] Practice or Industry Expertise	11C-15
		[iii] Offices	11C-16
		[iv] Lawyer Biographies	11C-16
		[v] News or Developments/Press	
		Releases	11C-21
		[vi] Subscription Forms	11C-22
		[vii] Alumni	11C-22
		[viii] Translation	11C-22
		[ix] Other	11C-23
	[c]	Writing for a Website	11C-23
	[d]	Search Function	11C-24
[2]	Min	i-Sites or Micro-Sites	11C-24
[3]		ign and Organization of a Web Site	11C-25
	[a]	Quick Loading Capacity	11C-26
	[b]	Easy Navigation	11C-26
	[c]	Easy to Read and Printable	11C-27
	[d]	Visually Interesting	11C-27
	[e]	Ease of Contacting the Firm	11C-28
	[f]	Mobile Sites and Responsive	
		Design	11C-28
[4]	Pror	noting the Website	11C-29
	[a]	Addresses on Contact Materials	11C-29
	[b]	Announcements	11C-30
	[c]	Website Directory Listings	11C-30
	[d]	Pushing Out Content	11C-30
	[e]	Incentives to Visit	11C-30
[5]	Asse	essing the Site's Effectiveness	11C-30
	[a]	Site Traffic/Web Analytics	11C-30
	[b]	Traffic Sources	11C-31
	[c]	Links to the Site	11C-32.1
	[d]	New Business	11C-32.1
[6]		er Website Considerations	11C-32.1
	[a]	Site Update Responsibility	11C-32.1
		<del>-</del>	

TABLE OF CONTENTS	xxvii
[b] Inquiry Response Time	11C-32.1
[c] Copyright Notice	
[d] Online Directories Link	11C-32.2
[e] Domain Names	11C-32.2
[f] Site Collaboration	11C-32.1
[g] Privacy Notice	11C-32.1
[h] Photography	11C-33
[i] Voice Search	11C-33
§ 11C.04 Content Marketing and Internet Technologies	11C-34
[1] E-Mail	11C-36
[2] Newsletters or Elerts	11C-36
[3] Business Proposals	11C-37
[4] Online Legal Matching (OLM)	11C-38
[5] Questionnaires and Surveys	11C-38
[6] Webinars	11C-39
[7] Client Service and Relationship	
Management	11C-40
[8] New Services	11C-40
[9] Extranets	11C-40
[10] Podcasts	11C-41
[11] Quick Response (QR) Codes	11C-42
[12] Video	11C-42
[13] Apps	11C-43
[14] Infographics	11C-44
[15] Aggregators and Syndicators	11C-45
§ 11C.05 Social Media	11C-46
[1] Listservs or Discussion Forums	11C-46
[2] Blogs	11C-47
[a] Blogs Versus Legal Writing	11C-50
[b] Sample Blog Post Template	11C-50
[3] X (formerly known as Twitter)	11C-51
[4] Wikis/Wikipedia	11C-52
[5] Social Networking	11C-53 11C-56
[6] Developing a Firm Policy	110-30
[7] Monitoring Your Firm's Online Reputation	11C-56.1
[8] Providing Social Media Training	
[9] Developing a Social Media Strategy	
[10] Negative Comments on Social Media	
[11] Social Media Analytics	
§ 11C.06 Search Engine Optimization	11C-57
§ 11C.07 Ethical Issues Involved in Online	110 37
Marketing	11C-61
[1] Responding to Inquiries	11C-61
[2] Confidentiality	11C-61

xxviii	MARKETING THE LAW FIRM			
	<ul><li>[3] Solicitation and Advertising</li></ul>	11C-62		
	Conflicts of Interest	11C-63		
	[5] Jurisdictional Issues	11C-63		
	[6] Client Testimonials or Links	11C-63		
	[7] Domain Names	11C-64		
	[8] Online Reviews	11C-64		
	[9] Social Media Profiles	11C-65		
	[10] Suggestions for Online			
	Communications	11C-65		
	[a] Disclaimers	11C-65		
	[b] Client Permission	11C-65		
	[c] Referral Capability	11C-65		
	[d] Prior Ethics Site Review	11C-66		
	[e] Date Materials	11C-66		
	[f] Adhere to Advertising Rules	11C-66		
	[g] Be Cautious	11C-66 11C-67		
§ 11C.08 Conclusion				
	PART III CHAPTER 12			
	Attorney Accountability and Involvement			
§ 12.01	The Role of the Lawyer in Marketing	12-2		
§ 12.01 § 12.02	Lawyer Marketing and Business Development			
	Training	12-3		
	[1] Goals of 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		
	[4] Follow-Up Methods	12-9		
	[a] Small Group or Peer Group	12.0		
	Meetings	12-9		
	[b] Regular Firm Meetings	12-9		
	[c] Special Marketing Meetings	12-9		
	[d] Written Communications	12-9 12-10		
		12-10		
	[5] Advice When Putting Together a Lawyer Training Program	12-10		
	[6] Conclusion	12-10		
		14-11		

	TABLE OF CONTENTS	xxix
§ 12.03	Individual Lawyer Marketing Plans [1] Justification for Individual Marketing	12-12
	Plans	12-12
	[2] Benefits of Individual 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	12-13
	Measurement	12-13
	[3] The Individual Planning Process	12-14
	[a] Situation Analysis	12-14
	[b] Mission or Vision	12-15
	[c] Long-Term Goals	12-15
	[d] Objectives	12-16
	[e] Strategies	12-16
	[f] Individual Marketing Action Plan	12-17
	[4] Conclusion	12-19
§ 12.04	Responsible Attorneys/Client Teams	12-20
· ·	[1] Responsible Attorneys	12-20
	[2] Client Teams	12-21
	[3] Concluding Comment	12-22
§ 12.05	Conclusion	12-23
	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

[3]

	[iv] I	Research/Competitive or	
		Business Intelligence	13-12
	[v] I	nternal Communications	13-12
	[vi] I	External Communications	13-12
	[vii] I	Database Management/CRM	13-12
	[viii] I	Business Development	13-13
		Strategy	13-13
	[x]	Client Services	13-13
		Training	13-13
	Īxiil l	Meeting and Event Planning	13-13
		Management	13-14
[d]	Job D	escriptions	13-14
[e]		vising and Evaluating the	10 1.
[~]	Ma	rketer	13-19
[f]	Other	Marketing Staff	13-21
[ <sub>1</sub> ]	[i] 7	Fraditional Hierarchy	13-22
		Functional Specialties	13-22
		Office or Regional Marketers	13-22
		Practice Group or Industry	13-22
		Professionals	13-22
	[ <sub>1,7</sub> ] ]		13-22
	[v] I	Directors of Strategy or Chief	12.22
	[v::] (	Strategy Officers	13-23
F1		Conclusion	13-23
[g]		ng Structures	13-23
	[i] I	Model 1: The Mid-Sized Law	12.22
	r 1	Firm	13-23
	[ii] I	Model 2: The Large,	12.24
	r	Multi-Office Law Firm	13-24
F1 7		Centralized Marketing Staff	13-25
[h]		Positions	13-28
		Director of Client Team	13-28
	[ii] (	Client Ombudsman or Service	4.0.00
		Center	13-28
	[iii] (	Client Manager	13-29
	[iv] I	Business Development or Sales	
		Professionals	13-29
	[v] I	Director of Pricing	13-30
[i]	Marke	eting Activities Analysis	13-30
[j]	Creati	ng Successful Relationships	13-31
	[i] A	Advice for Law Firms Hiring a	
		Marketing Professional	13-31
	[ii] A	Advice for New Law Firm	
		Marketing or Business	
		Development Professionals	13-32
[k]	The "	Q" Score	13-33
		f Administration	13-34.4

[b] Disseminate Marketing Information. 13-34.4 [c] Organize a Firm Database				TABLE OF CONTENTS	XXX1
Columbric   Granize a Firm Database   13-34.5			[a]	Collect Marketing Information	13-34.4
[d] Organize Marketing Meetings or Retreats			[b]	Disseminate Marketing Information	13-34.4
Retreats   13-34.5     [e] Oversee the Firm's Image   13-34.5     [f] Facilitate Lawyer Marketing   Efforts   13-35     [g] Monitor the Marketing Budget   13-35     [h] Work with the Support Staff   13-35     [i] Hire and Coordinate Outside   Resources   13-35     [4] The Role of the Marketing Partner   13-35     [5] The Role of the Marketing Committee   13-36.1     [6] The Role of Consultants and Agencies   13-36.2     [a] Benefits of Consultants   13-36.3     [ii] Experience   13-36.3     [iii] Specialized Skills   13-36.3     [iv] Objectivity   13-36.3     [vi] Complement Existing Staff   13-36.4     [viii] Focus Lawyer Attention   13-36.4     [viii] Focus Lawyer Attention   13-36.5     [iii] Selecting a Consultant and Service Providers   13-36.5     [iii] Determining the Need   13-36.5     [iii] Selecting a Consultant   13-36.6     [viii] Preparing for the Consultant   13-36.10     [viii] Preparing for Marketing   13-36.11     [1] Mission Statement   13-36.11     [2] Meetings   13-36.11     [3] Marketing Retreats   13-36.11     [4] Mission Statement   13-36.11     [5] Marketing Retreats   13-36.11     [6] The Role of the Marketing Retreat   13-36     [7] Planning Committee   13-37     [8] Marketing Retreat   13-36     [9] Selecting the Site   13-40     [10] Scheduling the Retreat   13-36			[c]	Organize a Firm Database	13-34.5
[e] Oversee the Firm's Image         13-34.5           [f] Facilitate Lawyer Marketing         Efforts           [g] Monitor the Marketing Budget         13-35           [h] Work with the Support Staff         13-35           [i] Hire and Coordinate Outside         Resources           Resources         13-35           [4] The Role of the Marketing Partner         13-36           [5] The Role of the Marketing Committee         13-36           [a] Composition of the Committee         13-36           [a] Composibilities of the Committee         13-36           [a] Benefits of Consultants and Agencies         13-36.3           [a] Benefits of Consultants         13-36.3           [ii] Creativity         13-36.3           [iii] Creativity         13-36.3           [iii] Objectivity         13-36.3           [iv] Objectivity         13-36.4           [vii] Reduce Nonbillable Time         13-36.4           [viii] Focus Lawyer Attention         13-36.4           [viii] Focus Lawyer Attention         13-36.4           [viii] Focus Lawyer Attention         13-36.4           [viii] Pocus Lawyer Attention         13-36.4           [viii] Pocus Lawyer Attention         13-36.4           [viii] Pocus Lawyer Attention         13-36.4			[d]		
Facilitate Lawyer Marketing					13-34.5
Efforts					13-34.5
[g]   Monitor the Marketing Budget   13-35     [h]   Work with the Support Staff   13-35     [ii]   Hire and Coordinate Outside Resources   13-35     Resources   13-35     [4]   The Role of the Marketing Partner   13-36     [5]   The Role of the Marketing Committee   13-36     [a]   Composition of the Committee   13-36     [a]   Composition of the Committee   13-36     [b]   Responsibilities of the Committee   13-36     [a]   Benefits of Consultants and Agencies   13-36     [a]   Benefits of Consultants   13-36     [ii]   Experience   13-36     [iii]   Specialized Skills   13-36     [iii]   Specialized Skills   13-36     [vi]   Complement Existing Staff   13-36     [vi]   Complement Existing Staff   13-36     [vii]   Reduce Nonbillable Time   13-36     [viii] Focus Lawyer Attention   13-36     [b]   Types of Marketing Consultants and Service Providers   13-36     [c]   Using Consultants Effectively   13-36     [ii]   Determining the Need   13-36     [iii]   Negotiating or Preparing an Agreement   13-36     Agreement   13-36     [viv]   Preparing for the Consultant   13-36     [viv]   Working with the Consultant   13-36     [viv]   Working with the Consultant   13-36     [viv]   Working with the Consultant   13-36     [viv]   Preparing for the Consultant   13-36     [viv]   Preparing for the Consultant   13-36     [viv]   Preparing for the Consultant   13-36     [viv]   Working with the Consultant   13-36     [viv]   Working with the Consultant   13-36     [viv]   Preparing for the Consultant   13-36     [viv]   Marketing Retreat   13-36     [viv]   Planning Committee   13-37     [viv]   Planning Committee   13-37     [viv]   Planning Retreat Objectives   13-39     [viv]   Marketing Retreat Objectives   13-39     [viv]   Marketing Retreat Objectives   13-30     [viv]   Planning Retreat Objectives   13-30			[f]		12.25
[h] Work with the Support Staff [i] Hire and Coordinate Outside Resources			г 1		
[ii] Hire and Coordinate Outside Resources					
Resources					13-33
[4] The Role of the Marketing Partner       13-35         [5] The Role of the Marketing Committee       13-36.1         [a] Composition of the Committee       13-36.1         [b] Responsibilities of the Committee       13-36.1         [6] The Role of Consultants and Agencies       13-36.3         [a] Benefits of Consultants       13-36.3         [ii] Experience       13-36.3         [iii] Creativity       13-36.3         [iii] Specialized Skills       13-36.3         [iv] Objectivity       13-36.3         [v] Crisis Management       13-36.3         [vi] Complement Existing Staff       13-36.4         [vii] Reduce Nonbillable Time       13-36.4         [viii] Focus Lawyer Attention       13-36.4         [viii] Focus Lawyer Attention       13-36.4         [b] Types of Marketing Consultants       13-36.4         [c] Using Consultants Effectively       13-36.5         [ii] Determining the Need       13-36.5         [iii] Selecting a Consultant       13-36.6         [iii] Negotiating or Preparing an       13-36.10         [v] Working with the Consultant       13-36.10         [v] Working with the Consultant       13-36.10         [v] Working with the Consultant       13-36.11         [1] Mission			[1]		12 25
[5] The Role of the Marketing Committee       13-36.1         [a] Composition of the Committee       13-36.1         [b] Responsibilities of the Committee       13-36.1         [6] The Role of Consultants and Agencies       13-36.3         [a] Benefits of Consultants       13-36.3         [ii] Experience       13-36.3         [iii] Creativity       13-36.3         [iii] Specialized Skills       13-36.3         [iv] Objectivity       13-36.3         [v] Crisis Management       13-36.3         [vi] Complement Existing Staff       13-36.4         [vii] Reduce Nonbillable Time       13-36.4         [viii] Focus Lawyer Attention       13-36.4         [viii] Focus Lawyer Attention       13-36.4         [viii] Focus Lawyer Attention       13-36.4         [viii] Preps of Marketing Consultants and Service Providers       13-36.5         [ii] Determining the Need       13-36.5         [ii] Determining the Need       13-36.5         [iii] Negotiating or Preparing an Agreement       13-36.6         [iv] Preparing for the Consultant       13-36.0         [v] Working with the Consultant       13-36.1         [v] Working with the Consultant       13-36.1         [v] Working with the Consultant       13-36.1		Γ <b>/</b> 1	The		
[a] Composition of the Committee					
[b] Responsibilities of the Committee					
[6] The Role of Consultants and Agencies [a] Benefits of Consultants					
[a] Benefits of Consultants		[6]			
[i]       Experience       13-36.3         [ii]       Creativity       13-36.3         [iii]       Specialized Skills       13-36.3         [iv]       Objectivity       13-36.3         [v]       Crisis Management       13-36.3         [vi]       Complement Existing Staff       13-36.4         [vii]       Reduce Nonbillable Time       13-36.4         [viii]       Focus Lawyer Attention       13-36.4         [viii]       Pocus Lawyer Attention       13-36.4         [viii]       Pocus Lawyer Attention       13-36.4         [viii]       Pocus Lawyers       13-36.5         [iii]       Pocus Lawyers       13-36.1         [viii]       Providers       13-36.1         [viii]       Providers       13-36.1         [viiii]       Providers       13-36.1		ΓοΊ			
Iii			[ <sub>co</sub> ]		
Iiii					
[iv] Objectivity       13-36.3         [v] Crisis Management       13-36.3         [vi] Complement Existing Staff       13-36.4         [vii] Reduce Nonbillable Time       13-36.4         [viii] Focus Lawyer Attention       13-36.4         [b] Types of Marketing Consultants and Service Providers       13-36.4         [c] Using Consultants Effectively       13-36.5         [i] Determining the Need       13-36.5         [ii] Selecting a Consultant       13-36.6         [iii] Negotiating or Preparing an Agreement       13-36.9         [iv] Preparing for the Consultant       13-36.10         [v] Working with the Consultant       13-36.10         [v] Working with the Consultant       13-36.11         [1] Mission Statement       13-36.11         [2] Meetings       13-36.11         [3] Marketing Retreats       13-36.11         [a] Organizing the Agenda       13-36.11         [a] Organizing the Agenda       13-37         [ii] Planning Committee       13-37         [iii] Informing the Lawyers       13-37         [iii] Informing the Lawyers       13-39         [b] Selecting the Site       13-40         [c] Scheduling the Retreat       13-40					13-36.3
[v] Crisis Management					13-36.3
[viii] Reduce Nonbillable Time       13-36.4         [viii] Focus Lawyer Attention       13-36.4         [b] Types of Marketing Consultants and Service Providers       13-36.4         [c] Using Consultants Effectively       13-36.5         [ii] Determining the Need       13-36.5         [iii] Selecting a Consultant       13-36.6         [iiii] Negotiating or Preparing an Agreement       13-36.10         [v] Working with the Consultant       13-36.10         [v] Working with the Consultant       13-36.10         [standard Statement       13-36.11         [liii] Mission Statement       13-36.11         [liiii] Marketing Retreats       13-36.11         [liiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii					13-36.3
[viii] Focus Lawyer Attention				[vi] Complement Existing Staff	13-36.4
[b] Types of Marketing Consultants and Service Providers				[vii] Reduce Nonbillable Time	13-36.4
Service Providers					13-36.4
[c] Using Consultants Effectively       13-36.5         [i] Determining the Need       13-36.5         [ii] Selecting a Consultant       13-36.6         [iii] Negotiating or Preparing an Agreement       13-36.9         [iv] Preparing for the Consultant       13-36.10         [v] Working with the Consultant       13-36.10         § 13.03 The Law Firm's Support for Marketing       13-36.11         [1] Mission Statement       13-36.11         [2] Meetings       13-36.11         [3] Marketing Retreats       13-36.11         [a] Organizing the Agenda       13-36.11         [a] Organizing the Agenda       13-37         [ii] Planning Committee       13-37         [iii] Marketing Retreat Objectives       13-37         [iii] Informing the Lawyers       13-39         [b] Selecting the Site       13-40         [c] Scheduling the Retreat       13-40			[b]		
[i] Determining the Need					13-36.4
[iii]       Selecting a Consultant       13-36.6         [iiii]       Negotiating or Preparing an Agreement       13-36.9         [iv]       Preparing for the Consultant       13-36.10         [v]       Working with the Consultant       13-36.10         [s]       13-36.11       13-36.11         [a]       Meetings       13-36.11         [a]       Marketing Retreats       13-36.11         [a]       Organizing the Agenda       13-36.11         [a]       Organizing the Agenda       13-37         [ii]       Planning Committee       13-37         [iii]       Marketing Retreat Objectives       13-37         [iii]       Informing the Lawyers       13-39         [b]       Selecting the Site       13-40         [c]       Scheduling the Retreat       13-40			[c]	- · · · · · · · · · · · · · · · · · · ·	13-36.5
[iii] Negotiating or Preparing an Agreement					
Agreement					13-36.6
[iv] Preparing for the Consultant       13-36.10         [v] Working with the Consultant       13-36.10         § 13.03 The Law Firm's Support for Marketing       13-36.11         [1] Mission Statement       13-36.11         [2] Meetings       13-36.11         [3] Marketing Retreats       13-36.11         [a] Organizing the Agenda       13-37         [ii] Planning Committee       13-37         [iii] Marketing Retreat Objectives       13-37         [iii] Informing the Lawyers       13-39         [b] Selecting the Site       13-40         [c] Scheduling the Retreat       13-40					
[v] Working with the Consultant. 13-36.10  § 13.03 The Law Firm's Support for Marketing. 13-36.11  [1] Mission Statement. 13-36.11  [2] Meetings. 13-36.11  [3] Marketing Retreats 13-36.11  [a] Organizing the Agenda. 13-37  [ii] Planning Committee. 13-37  [iii] Marketing Retreat Objectives 13-37  [iii] Informing the Lawyers 13-39  [b] Selecting the Site 13-40  [c] Scheduling the Retreat 13-40					
§ 13.03       The Law Firm's Support for Marketing       13-36.11         [1]       Mission Statement       13-36.11         [2]       Meetings       13-36.11         [3]       Marketing Retreats       13-36.11         [a]       Organizing the Agenda       13-37         [ii]       Planning Committee       13-37         [iii]       Marketing Retreat Objectives       13-37         [iiii]       Informing the Lawyers       13-39         [b]       Selecting the Site       13-40         [c]       Scheduling the Retreat       13-40					
[1] Mission Statement       13-36.11         [2] Meetings       13-36.11         [3] Marketing Retreats       13-36.11         [a] Organizing the Agenda       13-37         [i] Planning Committee       13-37         [ii] Marketing Retreat Objectives       13-37         [iii] Informing the Lawyers       13-39         [b] Selecting the Site       13-40         [c] Scheduling the Retreat       13-40	0 12 02	CE1			
[2] Meetings	§ 13.03				
[3] Marketing Retreats					
[a] Organizing the Agenda.13-37[i] Planning Committee.13-37[ii] Marketing Retreat Objectives13-37[iii] Informing the Lawyers13-39[b] Selecting the Site13-40[c] Scheduling the Retreat13-40					
[i] Planning Committee.13-37[ii] Marketing Retreat Objectives13-37[iii] Informing the Lawyers13-39[b] Selecting the Site13-40[c] Scheduling the Retreat13-40		[3]			
[ii] Marketing Retreat Objectives13-37[iii] Informing the Lawyers13-39[b] Selecting the Site13-40[c] Scheduling the Retreat13-40			[a]		
[iii] Informing the Lawyers					
[b]Selecting the Site					
[c] Scheduling the Retreat			ſħΊ		
[1] Longin of the Reneat 13-40					
				[1] Length of the Keneat	13-40

xxxii	MARKETING THE LAW FIRM	
	[iii] Days of the Retreat	
	[d] Selecting the Retreat Participants	
	[e] Running the Retreat	
	Consultant [ii] Disadvantages of an Outside	13-42
	Consultant	
	[f] Retreat Follow-Up	
	[g] Conclusion	
	[4] Training and Education	
	[a] The Importance of Support Staff in	
	Marketing	13-44
	[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	
	[e] Conclusion	
	[5] Resources	
§ 13.04	Budgeting for Marketing	13-49
	[1] Benefits of Having a Marketing	12 40
	Budget	13-49
	[2] What Law Firms Are Spending on	12 40
	Marketing	
	[3] How to Budget	
	[4] Affixing Accountability	
	[a] Marketing Plans	
	[b] Activity Budget Projections	
	[c] Other Controls and the Tracking of	
	Expenditures	
	[5] Case Studies	
§ 13.05		
g 13.03		
	[a] Major Problems With Existing	
	Systems	
	[i] Short-Term Focus [ii] Antithetical to Client	13-60
	Interests	13-60
	[iii] Internal Competition	
	[b] The Ideal Partner Compensation	
	System	13-61

	TABLE OF CONTENTS	xxxiii
§ 13.06	[c] Administering Partner/Shareholder Compensation [d] Alternative Systems  [2] Associate Compensation [3] Attorney Recognition [a] Partnership Criteria [b] Marketing Time [c] Written Recognition [d] Other Rewards  [4] The Role of the Marketing Professional in Rewards and Recognition [5] Conclusion  [5] Conclusion  Follow-Up [1] Why Follow-Up is Difficult. [2] How to Follow Up [a] Use Marketing Tools [b] Use the CRM or Database [c] Track Contacts [d] Identify Follow-Up Activities Early [e] Write Plans [f] Use a Docket or Calendar [g] Circulate Reports	13-63 13-64 13-65 13-66 13-66 13-67 13-67 13-67 13-69 13-70 13-70 13-70 13-71 13-71 13-71
	PART IV	
	CHAPTER 13A  Manketing the Small Law Firm	
§ 13A.02 § 13A.03 § 13A.04 § 13A.05	Marketing the Small Law Firm  Introduction Advantages to Marketing a Small Firm Disadvantages to Marketing a Small Firm Developing a Perception of Expertise. The Steps to Marketing a Small Firm Recommended Activities for Small Firms [1] Marketing Intelligence. [a] External Market Intelligence [b] Internal Market Intelligence. [2] Continual Communications. [3] Professional Marketing Materials and Web Site. [4] Media Relations. [5] Advertising. [6] Image. [7] Support Staff.	13A-1 13A-3 13A-4 13A-5 13A-7 13A-8 13A-8 13A-8 13A-9 13A-10 13A-11 13A-11

xxxiv		MARKETING THE LAW FIRM	
	[10] Cos	Promotional Activities  Networks and Networking  Client Service  ts of Marketing Activities  clusion and Advice to Small Law Firms	13A-12 13A-13 13A-14
		CHAPTER 13B	
	N	<b>Iarketing a New Capability or Office</b>	
		oduction	13B-3 13B-3
	[2]	Capabilities	13B-3
	[2]	Education/Awareness Building  [a] Orient Existing People  [b] Orient New People  [c] Hold Face-to-Face Get-Togethers	13B-3 13B-4
	[3]	Preparation for Cross-Selling or Selling	13B-4
		Needs	13B-5 13B-5
§ 13B.03	Exte	ernal Activities	
	[1]	Written Communications  [a] Press Releases and Advertisements  [b] Announcements  [c] Newsletters  [d] Practice Description	13B-8 13B-8 13B-8 13B-8
	[2]	[e] Directories         [f] Miscellaneous         Face-to-Face Communications         [a] Open Houses/Receptions	13B-9 13B-9
		[b] Client Meetings, Workshops and	12D 0
		Seminars	
§ 13B.04	Con	clusion	

TABLE OF CONTENTS	XXXV
CHAPTER 13C	
Creating an "Alumni" Relations Program	
§ 13C.01 Introduction	13C-1 13C-2 13C-3 13C-5
CHAPTER 13D	
<b>Cross-Selling Your Firm's Services</b>	
§ 13D.01 Introduction § 13D.02 Obstacles to Cross-Selling. § 13D.03 Cross-Selling Activities.  [1] Institutional Cross-Selling Activities  [a] Internal Activities.  [ii] Intranets and Internal  Newsletters.  [iii] Emails and Memoranda.  [iiii] Minutes of Meetings/Plans.  [iv] Internal Seminars/Webinars.  [v] Meetings.  [vi] Databases or Information That  Support(s) Cross-Selling.  [vii] Client Teams.  [b] External Activities.  [ii] Websites and Other  Materials.  [iii] Seminars and Programs.  [iii] Newsletters and Electronic  Communications  [iv] Client Surveys.  [v] Client Workshops and  Training.  [2] Individual Cross-Selling Activities.  § 13D.04 Conclusion	13D-1 13D-5 13D-5 13D-5 13D-5 13D-6 13D-6 13D-7 13D-7 13D-7 13D-7 13D-8 13D-8 13D-8 13D-8 13D-8
CHAPTER 13E	
Service Quality as a Marketing Strategy	
§ 13E.01 Introduction	13E-2 13E-4

xxxvi	MARKETING THE LAW FIRM	
	<ul><li>[1] Continuous Improvement</li></ul>	13E-4
	Employees	13E-4
	Top	13E-4
	[4] Client Focus	13E-4
	[5] Process and System Focus	13E-4
	[6] Measurement	13E-5
§ 13E.03	How Service Quality Is Defined by Clients	13E-6
	[1] Components of Service Quality	13E-6
	[2] Status of Law Firm Quality Efforts	13E-7
	[a] Leadership	13E-7
	[b] Information and Analysis	13E-8
	[c] Strategic Quality Planning	13E-8
	[d] Human Resource Development and	4.000
	Management	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
	[2] Firm Management/Motivation	13E-10
. 125 05	[3] Firm Administration/Resources/Systems	13E-11
§ 13E.05	Beginning Quality Initiatives in a Law Firm	13E-12
	[1] Client Involvement	13E-12
	[2] Measurement	13E-12
	[3] Quality Checks	13E-13
	[4] Involvement of All Personnel	13E-13
	[5] Service Guarantees	13E-13
	[6] Recognition and Rewards	13E-14
§ 13E.06	Conclusion	13E-15
	CHAPTER 13F	
	Client Service Strategies	
	Introduction	13F-2
	The Importance of Existing Clients	13F-3
§ 13F.03	Client Perceptions of Counsel	13F-4
	[1] Good Clients Often Feel Taken For	125 4
	Granted	13F-4
	[2] Client Perceptions Are Reality for	125 4
	Clients	13F-4
	[3] Clients' Views of the "Firm" Are Based on the Individuals With Whom	
		13F-4
	They Deal	135-4

		TABLE OF CONTENTS	xxxvii
	[4]	Perceived Value Is More Important	
		Than Fees	13F-5
§ 13F.04		roving Client Service as a Firm	13F-6
		Clients	13F-6
		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 [b] Brainstorm Activities to Recognize	13F-8
		and Reward Clients	13F <b>-</b> 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	
	r_1	Client Service Areas	13F-10
		[a] Recruiting	13F-10
		[b] Orientations	13F-11
		[c] Training	13F-11
		[d] Recognize and Reward Good	131 11
		Client Service	13F-11
	Г21	Implement Client Feedback Programs	13F-11
	[3]		
		[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
	[5]	Make Your Firm Easy to Do Business	
		With	13F-17
		[a] Good, Clear, Timely Invoices	13F-18
		[b] Accessibility	13F-18

X	xxviii	MARKETING THE LAW FIRM	
		<ul><li>[c] Communications</li></ul>	13F-19 13F-19
		Improvements From All	
		Personnel	13F-19
		[6] Add Value to Client Relationships [a] Providing Seminars and	13F-20
		Workshops	13F-20
		[b] Issuing Substantive Materials	13F-20
		[c] Acquiring Business/Industry	
		Knowledge	13F-20
		[d] Saving Money	13F-21
		[e] Patronizing Client Businesses	13F-21
c	125.05	[7] Create a System for Client Retention	13F-21
8	13F.05	Conclusion	13F-23
		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
		[1] Client Service and Retention	13G-5
		[2] Branding and Marketing	13G-5
		[3] Information Sharing	13G-5
		[4] Business Development and Referrals	13G-6
		[5] Sharing Resources	13G-6
§	13G.04	Considerations in Forming or Joining	
		a Network or Alliance	13G-7
		[1] Formality and Size	13G-7
		[2] Client Communication	13G-7
		[3] Exclusivity and Geographic	
		Representation	13G-8
		[4] Similarity of Firms/Quality Control	13G-8
		[5] Role of Member Firms and	
		Individuals	13G-9
		[6] Ethical Considerations	13G-9
§	13G.05	Marketing the Network or Alliance	13G-11
		[1] "Internal" Marketing Activities	13G-11
		[a] Lists of Members	13G-11
		[b] Communications	13G-11
		[c] Meetings	13G-11
		[d] Information Exchange	13G-12

		TABLE OF CONTENTS	xxxix
§.	13G.06	[2] External Marketing Issues.  [a] Branding.  [b] Advertisements  [c] Videos.  [d] Materials.  [e] Thought Leadership  [f] Marketing Presentations and Materials.  [g] Proposals.  [h] Trade Shows.  Measuring the Impact	13G-12 13G-12 13G-12 13G-12 13G-12 13G-13 13G-13 13G-13 13G-14
		Conclusion	13G-15
		CHAPTER 13H	
		Artificial Intelligence	
§	13H.01	Artificial Intelligence	13H-1
		<ul><li>[1] Introduction</li></ul>	13H-1 13H-2 13H-4
§	13H.02	Uses of Artificial Intelligence	13H-5 13H-7
§	13H.03	[2] ChatGPT and Law Firm Marketing Artificial Intelligence Policies and	13H-8
-		Regulations	13H-9
		Artificial Intelligence and Public Relations	13H-11
		AI and Influencers	13H-12
§	13H.07	Optimization  The Dark Side of AI	13H-14 13H-15
		PART V	
		CHAPTER 14	
		Conclusion	
§	14.01	The Future of the Legal Practice	14-2
		<ul><li>[1] Continued Consolidation of Law Firms</li><li>[2] Continued Development of Networks</li></ul>	14-2
		and Associations	14-3 14-3
		L-1	

### MARKETING THE LAW FIRM

	[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	14-9
	[11]	Continued Development of In-House	
		Marketing Departments	14-9
	[12]	Hybrid Working	14-9
		[a] Workplace Experience	14-12
		[b] Disengagement	14-12
§ 14.02	Adv	ice to Law Firms in Their Marketing	
	E	fforts	14-14
	[1]	Develop a Market-driven Culture	14-14
	[2]	Plan and Focus	14-14
	[3]	Manage the Firm and Its Growth	14-15
	[4]	Decentralize Marketing Efforts	14-15
	[5]	Educate and Communicate	14-15
	[6]	Follow Up	14-15
	[7]	Measure Marketing Success	14-15
	[8]	Position the Firm	14-16
	[9]	Focus on Quality	14-16
	[10]	Be Creative	14-16
§ 14.03		cluding Comment	14-17
APPEN	DIX .	A: Law Firm Marketing Resources	A-1
INDEX			T-1