

# Attorney Marketing 101

By Frank Ramos &  
John Remsen, Jr.



DEFENSE LAWYERS. DEFENSE LEADERS.

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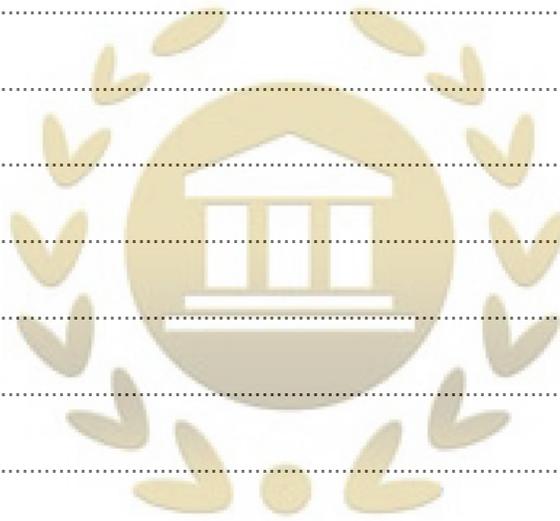
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# ATTORNEY MARKETING 101

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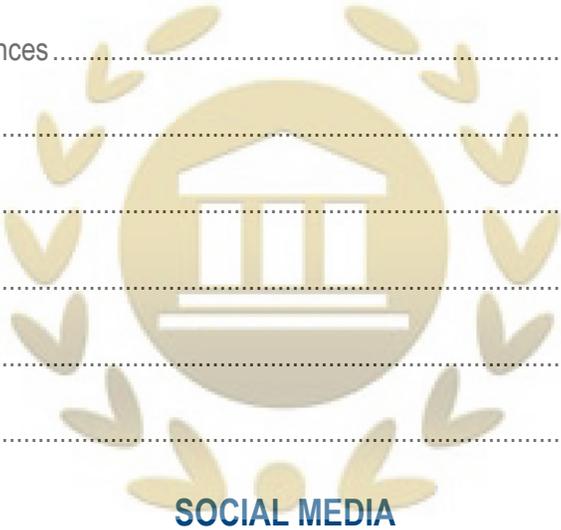


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## About the Authors

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## About the FDCC

The Federation of Defense & Corporate Counsel is composed of recognized leaders in the legal community. The FDCC is dedicated to promoting the knowledge, fellowship, and professionalism of its members as they pursue the course of a balanced justice system and represent those in need of a defense in civil lawsuits.

The Federation's membership consists of defense lawyers (limited to 1200 in the United States), insurance industry representatives, corporate counsel, and corporate executives with national or regional responsibility for the defense of claims and litigation.

Current membership is approximately 1400 from the United States and around the world.

## About The RemsenGroup

TheRemsenGroup is a consulting firm that works exclusively with law firms to help them develop and implement long-term strategic objectives to improve cohesiveness, performance and profitability. Since 1997, we've worked with hundreds of law firms and thousands of lawyers, with most of our clients ranging in size from 15 to 200 lawyers. In 2001, TheRemsenGroup launched The Managing Partner Forum, the nation's richest source of information and the most highly acclaimed conference series for leaders of mid-size law firms. More than 1,100 managing partners from 850 law firms in 43 states have participated in 25 leadership conferences. To learn more, visit [www.TheRemsenGroup.com](http://www.TheRemsenGroup.com) and [www.ManagingPartnerForum.org](http://www.ManagingPartnerForum.org).



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## Introduction

There are two kinds of lawyers in private practice. There are lawyers with clients and lawyers who work for lawyers with clients. Where do you want to be at the peak of your career?

There is a fallacy that rainmakers are born, not made. Rainmaking, in fact, is a skill, which can be learned like any other skill. We, as lawyers, are not born as persuasive orators or strong writers or effective deposition takers. We learn those skills by observing others, through practice and trial and error. Rainmaking – attracting and keeping clients – can also be learned. That's what this book is about.

This book will teach you the skills you need to develop relationships with and positively influence prospective clients so they see you as someone they trust with their matters.

In these pages, we help you develop an effective marketing plan and tell you how to implement it. And it's never too early to start learning and implementing our advice. The seeds you plant early in your careers will bear fruit in due time.

So you want to be a rainmaker? You want to have your own book of business? You want security and autonomy?

Then dive in and we'll show you how.



# INVESTING IN YOU

## Why Market?

There are two kinds of lawyers in private practice. Lawyers who work with clients and lawyers who work with lawyers with clients. Where do you want to be at the peak of your legal career?

As a young lawyer, it's tempting to just work on one's cases – prepare motions, draft status letters, take depositions – and not market. Who has time to join organizations, attend functions or write articles? Who has time to develop an online presence, mingle, catch up with old friends, send handwritten letters and be part of the conversation?

You have the time if you want to control your own destiny. Do you want to seize control of your career, working for clients you enjoy and on matters you find challenging? Do you want job security? Do you want autonomy? Do you want to make more money? To do all this you have to get out from behind your desk and meet people, and talk to them and develop relationships with them so they think of you when they have a case to refer.

Over time, these relationships can translate into a book of business, and the bigger the book, the more you can dictate the path of your career. Clients - your clients, the ones who call you, refer you cases, rely on your expertise - provide you freedom and empower you to set your own goals and pursue your own dreams.

So getting back to the question, why market? Because the alternative – sitting at your desk, grinding out work day in and day out, month in and month out, year in and year out – isn't much of an alternative. Marketing allows you to take control of your future. Marketing can change your life. This is a long term investment in you and your career. It's about making marketing a priority and looking beyond today's billable hours. Stop asking yourself why market, and start asking how.



## Reputation

Whether you realize it or not, you have a reputation. You're considered ethical or dishonest, hardworking or lazy, thorough or haphazard, competent or amateurish, an expert or a novice, pleasant or obnoxious. There are so many aspects that contribute to and color your reputation. And all of it is in your control.

The most important thing you have as an attorney is your reputation. A reputation takes years, often decades to earn. You earn a positive reputation because you are reliable, you work hard, and you over-deliver. And, just as you build a reputation by doing the right things, the wrong things can tarnish your reputation in a New York minute.

An honest, hardworking, well-prepared expert in a field of law will serve himself and his client better than someone lacking these traits. If you want to attract clients, you want a good reputation that precedes you. Someone who can be trusted with the difficult, bet-the-company case, who has a good relationship with opposing counsel and the Court, and who will come running when the fire alarms go off. Building such a reputation takes time, but it's well invested time which will pay off dividends in the future.

Everything you do – every interaction with opposing counsel, every question you ask in deposition, every argument before a judge, every motion you draft and every letter you write – adds to or diminishes your reputation. Take the time to build it up rather than tear it down.



## Relationships

Business development is based on relationships. If you only take one thing from this book take this – people refer cases to those they know, like and trust – and therefore all business is born from relationships.

Put yourself in a client's shoes. If you had a case, to whom would you refer it? Would it be to someone you know or to a stranger? If you didn't know someone who could handle the matter, would you ask colleagues for recommendations? Would they recommend to you someone they know or who was a stranger to them?

People refer cases to those they know, preferably they know well, like and trust. If people don't know you, they won't refer you cases. How do you get known?

Build on the relationships you have – former classmates, colleagues, and friends. Meet new people through trade associations, bar associations or charities. Stay in contact with them, ask them out for coffee or lunch and stay connected through Facebook, LinkedIn or Twitter.

Be strategic as you go about building and maintaining relationships. Associate with winners who are going places, people who are in the ascent of their careers. Be sincere and authentic, but remember, your time is valuable. Focus on meaningful relationships with people going places, people who have a mutual benefit from the relationship.

Referral sources need to know you to refer you work. Relationships with referral sources – where you meet them and stay in touch with them so you're on their radar when they have a case – is the basis of all marketing. No relationships, no clients.



## Your Niche

There are riches in niches, my friends! If you want to distinguish yourself from other attorneys (1.3 million to be exact), then develop a niche practice.

Discover an area of the law that you're passionate about and that you would want to become an expert in, and drill down and establish yourself in that practice area. It's a lot like declaring a major in college. You can receive guidance but, at the end of the day, you make the decision. Long about your 3rd or 4th year in private practice, you should have reviewed your options and dedicated yourself to a specific niche.

Once you've committed to a specific niche, go to seminars about that practice area. Participate in listservs in that practice area. Follow blogs, read articles and attend CLE in that practice area.

Become a leader in your local, state or national bar association with a focus on your specialized area of interest. If available in your state, get board certified so you can legitimately claim to be a specialist or expert in that specific area of interest.

After you develop expertise in the area, start writing, speaking and presenting on topics of interest in that area of law. Grow your knowledge and expertise and present yourself as an expert who writes articles and provides speeches that others read and listen to.

It's easier to become an expert in a finite area of law and it's easier to market yourself as an expert in a finite area of law. Everyone is a litigator, but you handle cyber crimes. Everyone handles commercial cases, but you handle patent infringement matters.

Going back to whom you would refer a case – not only would it be someone you know, but it would be someone you consider an expert in that area. Clients hire experts, not jacks of all trades. You want to be that expert, that person whose resume shouts out that you know how to handle that type of case inside and out.

While others may spend hours or days researching the relevant issues, you already have identified them and know how they play out. Becoming the go-to expert in an area of law is a powerful marketing tool.



## Become an Expert

We all hire experts. If you need shoulder surgery, you find your way to an orthopedic surgeon. You want someone who is a leader in his field, who has performed the procedure hundreds of times, who's taught others the procedure and who has glowing recommendations from his patients. When you take your car to a mechanic, you want that mechanic to be specialized in your vehicle's specific make and model. You want him to have the knowledge and tools to get the job done properly.

Much the same can be said when clients search for lawyers. Clients who are looking for an attorney to handle their matters are looking for experts. They want someone who has handled the matter numerous times, who has taught others through his writings and presentations, and who knows the ins and outs of the issues.

You don't want to be known as a general practitioner or, in other words, a jack of all trades and a master of none. You want to develop a reputation of being the go-to attorney in a certain area of law, handling specific types of matters.

The more you know about a practice area, the more cases you handle in that area, the more you write and speak on that area, the greater your reputation will be in that area and the more likely others will see you as an expert, see you as someone they want to hire. You'll talk the talk and walk the walk and come across as someone who was born to tackle the client's problems, care for their needs and resolve their issues.

Focusing your energies on one area of the law - writing about it, blogging on it, speaking and presenting on it – will turn you into a sought after expert.



## Credentialing

As an attorney, you want to distinguish yourself from the hordes of other attorneys out there. One way to do that in through board certification.

In Florida, you can become board certified in several areas, including as a trial lawyer, an employment lawyer or an aviation lawyer. It's a distinction you can include on your firm website, on your letterhead and when speaking with potential clients. You file an application describing your expertise in an area (for example, the number of cases you've tried or the number of evidentiary hearings you've handled), take a review course and sit for an exam. If your application and test scores meet the requirements, you're deemed an expert in the area by your state bar association.

If you don't have the qualifications to satisfy the requirements for board certification, take other steps to build your credentials in a certain field. Consider starting a blog where you summarize and analyze new cases in the field. Seek out opportunities in your firm to handle trials in your specific area of law. Get published in trade association journals and magazines.

The more you do to distinguish yourself, the greater your credentials will be to convince clients you're the right attorney for their matter.



## Your Target Audiences

Once you have selected your niche, developed your reputation and can claim expertise, you have to shift attention to folks in a position to hire you. That's your target audience.

When determining a target audience, it's important to be methodical and precise in how you reach them. For example, say you are out fishing, just trolling the ocean and hoping for a fish to jump in the boat, but you have no idea what you are trying to catch. Chances are, you aren't going to have much luck finding a fish that not only jumps in the boat, but also meets your needs. However, if you decide you are trying to catch a sailfish, you know to fish at a certain depth with a specific bait during a precise time of year.

The same goes for defining your target audience. It's like finding the reef where the fish hang out. Go to that reef, or in this case, that association or meeting or conference, and be present with those people. Speak to them. Don't wait for them to come to you. Go out and get them, always remembering to invest your time in what's really going to get you somewhere.



## Your Plan

We've all heard the saying, failure to plan is a plan to fail. To give your career direction you need a plan. Do you have plans on becoming an expert in a practice area? On becoming a leader in a trade or bar association? On developing and growing a book of business? On writing a book? On developing close and meaningful relationships with referral sources? On managing your time between family, work and business development?

You need to ask yourself these questions and create a written plan where you delineate your goals and write concrete action steps to achieve them. Studies show us over and over, if you put your goals in writing, you drastically increase your chances of achieving the goals. You need a plan, and you need to put it in writing.

Most of us have New Years' resolutions. December, particularly late December, is a good time to sit down and write out your work resolutions – your professional goals for the coming year and what steps you will take to reach them.

Perhaps you want to climb the ladder of leadership in an organization. You may write down that you want to help market an event, speak at a luncheon and write an article for the newsletter. Perhaps you want to improve your bona fides in an area of law. You may want to write down attending a seminar, daily reading two blogs and possibly starting your own blog on the topic.

Whatever you have in mind, define concrete steps to get there and then take them. You may not reach all your goals for the year, but by having them you will accomplish a lot more than those who never took the time to put pen to paper and write a plan for their lives.

In addition to detailing your plan in writing, share your goals with family, friends and colleagues. The act of sharing adds pressure, and that pressure helps push you in the direction of the goal.

Remember, your plan is an investment in you. It helps you move forward, thinking proactively and deliberately. It should be realistic, achievable and specific.



## Time Commitment

Developing business takes time. Developing relationships with referral sources takes time. Getting out there, pressing the flesh, making small talk, traveling to conferences, speaking at seminars and writing articles all take time. Business development can feel like a second job. You put in a full day of billable work and then you have to spend time doing unbillable business development, not knowing whether it will translate into a case coming in the door. We wish we could tell you there were shortcuts. We wish we could tell you that it doesn't take much time or energy to develop a book of business. But there are no shortcuts.

So, how much time should you be investing in a plan and in the marketing of your abilities?

Prepare to invest two to five hours per week. This time needs to be a priority and it must be sustained. Each day you need to carve out some time – whether it's sending a handwritten letter, connecting with someone on LinkedIn, meeting someone for coffee, or researching a topic for an article you're writing – to advance your marketing goals. While you feel pressured to focus on churning out the billable hours, what you do with your non-billable time will determine your future. If you are not investing in the long term, you are being shortsighted. Taking the short term view – focusing only on billable work – will cost you in the long run. Many law firms don't track, expect or reward non-billable time. Regardless, you need to do this for you, whether your firm requires it or not.

If you want the autonomy and income stream you crave, you need to commit to marketing as a lifestyle and market every day. Just like you take time to work out, watch your favorite programs and go to the movies, take time to make marketing part of your routine.



## Do What You Enjoy

If you don't enjoy marketing, you won't do it. It's easier to sustain activities you enjoy. So you have to find what aspects of marketing you like and focus on those aspects.

Join organizations you are passionate about. Take on projects you are passionate about. Let's say you want to advance in an organization, but you don't enjoy giving presentations. Of course, you should challenge yourself, speak at smaller events, lead meetings and build up to a roomful of spectators. But let's assume you simply don't want to. You can write for the organization. Or you can help plan events and recruit others to speak. Or you can edit a newsletter, provide copy for the website, be a greeter at a function or volunteer at a silent auction.

Focus on activities you enjoy. For example, if you like golf, build golf into your personal marketing plan. You are much more likely to make marketing a priority if it is coupled with an activity you enjoy.

When you love what you do, others will see that, will be attracted to you and will want to have a relationship with you, which can lead to a referral down the road. So direct your passions to marketing endeavors that you will enjoy and that you feel comfortable pursuing. Not everyone can work a room. But you can send handwritten notes, personal emails, meet others for lunch or drinks and comment on Facebook.

Above all, make your marketing fun.



## Do What You Are Good At

Just because you enjoy something, doesn't mean you are good at it. When considering activities to add to your marketing efforts, factor in the areas in which you excel. While it's easier to do the things you are naturally good at, you can always seek improvement in the areas where you falter.

If you are fond of speaking, but can't seem to capture the audience's attention, find training through Toastmasters organization. If you are passionate about writing, but have terrible grammar, enroll in a community college course.

Pursue the things you enjoy and are good at—that's the magic combination.



## Habits

Make habits out of things you enjoy and things you are good at. Marketing - like brushing your teeth, your morning jog, watching the nightly news or walking your dog – needs to become a habit. It must become something you do as part of your routine. The most effective rainmakers and business developers work marketing into their lifestyle. Morning, noon and night, they are always thinking about reaching out to others. Marketing is a habit that needs to be implemented into your lifestyle. It's not a series of starts and stops, it's every day, every week – it's part of you.

You set time aside each day to take care of your personal needs. You need to also set time aside each day to market. Get in the habit of coming into the office early, setting aside a half hour to an hour per day, and marketing. For example, your morning routine could look like this:

Monday mornings	Send personal notes
Tuesday mornings	Invite contacts to coffee or lunch
Wednesday mornings	Work on an article or blog
Thursday mornings	Work on a presentation
Friday mornings	Send articles of interest to colleagues

If you don't make marketing part of your schedule so that it becomes a habit, it will be haphazard at best and non-existent at worst.

In addition to a morning ritual, get in the habit of a weekly coffee meeting in the morning and a weekly luncheon meeting. That's two meetings a week and eight a month. If you make coffee and lunch part of your routine, you will have about 100 face to face meetings over the year. This will help you develop the relationships with contacts that will lead to referrals.

The more marketing becomes part of the fabric of your life the more instinctive it will become and the less intrusive it will seem.



## Your “A” List

Sit and write the names of your contacts who are most likely to refer you a case. This is your “A” list - those individuals you know who have or may likely refer you a matter. They include existing and potential referral sources.

Include in the list existing clients, former clients with whom you have a good relationship, referral sources who have referred you matters in the last 18 months, in-house counsel you know, and anyone else who sees you as a “go to” litigator. Include their names, titles and contact information. They are the ones most likely to refer you a case.

When thinking of who to include, be selective. You don’t have enough time in the day to befriend everyone. Determine who will mutually benefit from your relationship and who is in or will be in a position to further your career today or tomorrow. Be genuine and sincere in your choices.

Once you prepared the list, decide how you plan on reaching out to each and every one of them. Yes, each and every one of them.

For existing clients, consider taking them out for a meal or do a site visit. For former clients, consider sending a handwritten letter or a personal e-mail asking to reconnect. For local contacts, coffee or lunch should do. For contacts in other states or regions, plan on meeting them at a mutual conference, call them or a send them a small personal gift reminding them that you’re there and available to work on their matters.

Your “A” list is those contacts with whom you want to develop close and meaningful relationships which will bear fruit. They are the folks who will build your book of business. So you need to identify them and decide what you will do to stay on their radar so they think of you when they have new matters.

It all starts with writing down your “A” list. Once you have the names on a piece of paper, the next steps – coffee, lunches, client visits, handwritten notes, and personal e-mails – will come naturally.



## Dress for Success

Many firms have gone from casual Friday to casual all the time. That has caused many of you to swap your business suits for casual wear, except for those days when you have a hearing or a deposition.

Whether you like it or not, people form an opinion of you within seconds of an initial meeting. We are a very visual society and people judge you by what they see. You truly have one shot at a first impression.

It's particularly important for young professionals to look the part. Polished, organized, smart and confident. And what you wear and how you package and present yourself speaks volumes as to how others perceive you. As a young lawyer, it's important you look the part.

Starting out, both men and women should have three high quality suits that are tailored. Attire should be conservative and traditional, designed to last many years. Suits, dress shoes, dress shirts and blouses – they make an impact. If you dress the role others will think you're ready for it.

Understand that the way you dress projects an image of who you are to potential clients, and remember that potential clients are everywhere and you interact with them every day. They are colleagues you meet for lunch, friends you have drinks with, and contacts you see when running into or out of your office building. To make an impression on them as someone who can handle their matters professionally, you want to look professional.

Invest in a wardrobe and get into the habit of wearing suits to work. Those you meet for coffee, lunch or drinks will take notice.



## Develop Public Speaking Skills

If you want to develop a niche practice and become known as an expert in a given field you're going to want to speak on the topic, and if you do, you better have the skills to give well delivered speeches.

Audiences remember good speakers, and they remember the bad ones.

Do you have something to say? Do you say it in a captivating, entertaining manner in plain English? Speaking in front of an audience is a skill no different than taking a deposition or writing a persuasive motion. It takes time, it takes practice, and it takes trial and error.

Where do you get the practice? Consider joining Toastmasters. They meet weekly and they equip you with the skills on how to speak to an audience (and they provide you a roomful of prospective clients). The more you practice, the more comfortable you will become and the more effective your presentations will be.

While developing your skills, it's still important to be selective – don't just take any speaking engagement. Whenever possible, focus on your target audience. Start out with smaller presentations – a breakfast networking function or being one of several panelists at a neighborhood town hall. Get your sea legs, and build from there into bigger speaking opportunities with larger audiences. Also develop your Power Point skills to complement the content of your speech. Includes handouts, and always get the list of attendees for future follow-up.

Once you become an effective speaker, folks will notice, and more speaking opportunities will follow.



## Become a Storyteller

Whether at lunch, a reception, or dinner, we all are enraptured by a good storyteller. Someone who knows how to set up the story, describe the characters, set the scene, create conflict and then resolve it. The ups and down, the hand motions and gesticulations – all for the grand conclusion, the payoff, the end we've been waiting for.

Those of us who can tell captivating stories will always have an audience willing to listen, willing to be caught up with the ebb and flow, with the drama and the humor, the tension and the resolution. A good storyteller is an effective communicator.

Good story tellers persuade judges and convince juries. They grab hold of the attention of others and lay claim to it.

We all love a good story. We go to movies, read books, watch television. We like beginnings, middles and ends, strong characters, interesting plots and satisfying resolutions. Learn how to tell good stories and you'll become a better lawyer and a better marketer.

Go to your local bookstore and peruse the section on how to write fiction and pick out a beginner's book. It will explain how to tell a good story – how to craft it, how to portray your characters, how to create tension, how to build to a crescendo, and then how to bring it all together for a happily ever after. And after you read it, start practicing with your spouse and your friends – when you go out for dinner or hang out at home. Learning how to tell a good story is a shortcut to getting the attention of others and developing closer relationships.



## Read Marketing Books

While you're at the bookstore checking out books on storytelling, go down a few aisles to the business section and peruse the books on marketing and sales. Visit Amazon online and type in "rainmaking." See what books are available. Read through the tables of contents, skim through the chapters and invest in 2 or 3 books that offer varied advice on how to develop business. You'll know the right books to buy when you come across them. They'll provide common sense advice with concrete steps on how to carry it out.

There are no short cuts to marketing, and the good books will acknowledge that and will tell you how to do the hard work to reach your goals. They'll talk about relationships and how getting out from behind your desk to meet others, talking about what's important to them, and how forming bonds will not only lead to business but more importantly lasting friendships.

The more you read the more you will see that the advice offered is divided into two camps – the get-rich-quick schemes, such as getting to be the first name on a Google search or getting more clicks than the next lawyer, and the longstanding advice that's been around since Dale Carnegie taught us how to win friends and influence people, namely nurturing meaningful relationships with others.

Go ahead. Look at the other books on marketing. They'll say what this book says about relationships. And by reading them you will realize that marketing is about connecting with others on their terms, earning their trust and having them come to see you as someone who can help them when they need help.



## Build Your Biographical Profile

Attorneys have resumes for the world to see – your biographical profile on your firm’s website. Anyone thinking of hiring you will review your profile and use that to determine who are as an attorney. Build it up.

Your profile should feature a summary that details your niche and target audience. It should also include a section of articles you’ve written, a section of presentations you’ve given and organizations where you hold leadership roles.

When prospective clients look at your profile they want to see an expert who can handle their matters. They want to see someone who not only says they practice in the area they need help in, but belongs to and leads organizations in that area, who’ve written on that area and have spoken in that area. They want to know you’re considered an expert by your peers and therefore can answer their questions and handle their matters well and efficiently.

Take some time and look at other attorney profiles on firm websites. See what organizations you may want to consider joining, what publications you may want to write for and what topics you would want to speak on. Think ahead and envision what your profile will look like years from now. How will it look? What will it include? What accolades and awards will be listed? You should always work to build your professional resume to grab the eye of potential clients.

Whenever possible, your profile should include a professional photograph. The picture should convey a lawyer who is confident, hardworking and knowledgeable. If your firm doesn’t provide professional photos, hire someone yourself – it’s an investment in you and your future.



## Follow the News

If you want to hold up your end of conversations at meals and receptions, follow the news. Not just the news that interest you, but all news that interests your target audience. You may not want to follow the elections, but most do. You may not watch sports, but most do. Spend a few minutes every morning and every evening to scroll through the Google newsfeed. Read through the top stories, local, world, elections, business, sports, science, etc.

You'll never know what others you meet may want to talk about or where their interests lie. They may want to discuss that new medical discovery, the playoffs or the presidential campaign.

To have an intelligent conversation on their terms you need to be well informed. You need to follow the news and follow it from different perspectives. Don't just watch CNN – watch MSNBC and FOX news. Don't just read the New York Times or the Wall Street Journal – read articles from publications across the social and political spectrum.

And consider the regional element when determining what news to follow. For example, if a target audience member is located in the South, it's a good idea to be well-versed in college football.

You want to know not only what's going on, but what others are saying about it and how they're saying it. The more you know the more easily you can slip from one conversation into another on a wide variety of topics.

Being able to carry a conversation is an important skill to have as a networker at events where you will meet potential referral sources.



## Stay Informed About the Legal Community

In Miami, there's a publication called the Daily Business Review. It provides you a daily reporting of what's happening in the local legal community. What firms are merging, which ones are folding, the big verdicts, the defense verdicts, judicial profiles, the hot cases and the legal trends.

You want to know which clients have legal needs in your backyard, who's meeting those needs, and whose needs are not being met. What are the hot areas of the law? What seminars are coming up and who's speaking at them? What are the local networking functions and who's sponsoring them? Which judges are running for reelection and which ones are facing opposition?



## **Follow the community that matches your practice.**

Knowing what's going on in your legal community will help you know which practice areas to target and which clients to pursue. It will help you evaluate which organizations to join and how to get your name out there. In addition to reading local legal publications, follow national ones as well as blogs that explore legal trends and news.

Not only will you be informed about what your firm should be doing to take advantage of the current legal trends, you will learn how to better serve your clients by being aware of the issues that concern and affect them.

But a word of caution: stay informed, but don't cloak yourself in the legal community. Don't become so comfortable that you surround yourself only with other lawyers and legal community events. Many lawyers find refuge in these communities, but by doing so, you stop marketing. Be involved as a method of marketing, not an alternative to marketing.



## Rankings and Directories

There are plenty of lawyer rankings and directories playing to your ego that will delight in taking your money. Danger, Will Robinson! Before shelling out your money, be very thoughtful and exercise due diligence. Consider your target audience. Learn the rankings and directories that garner their attention.

These days, there are numerous rankings and ratings for attorneys. For starters, there is the coveted AV rating. As an attorney, you don't have to wait for Martindale-Hubbell to reach out to you about a potential AV rating. You can call them and put the process in motion and provide them names of those who know and respect your work. And of course there are countless other directories – Chambers, Best Lawyers and Avvo, to name a few. Learn how you get on their lists and what steps you can take to have you and your firm considered.

Some listings, particularly local listings, are simply popularity contests, some are more. Know which listings mean something and which ones are nothing more than window dressing. The right ones offer you a seal of approval – they tell prospective clients that you've been vetted and that you're one of the best attorneys to handle their matters.

Take a strategic approach when it comes to rankings and directories, and seek out those that most likely will impress the clients you want to impress.



## Get a Rainmaking Mentor

There are those attorneys who are gifted rainmakers. They know everyone, everyone knows them, they glide through networking functions, they're bar leaders, clients love them, and they get case after case referred to them. How do they do it? Ask them.

Seek out rainmakers, whether in your firm or outside of it, ask them to lunch and tell them you want to learn how they do it. What functions do they attend? What organizations do they belong to? How do they break the ice with new contacts? How do they bring up business with prospective clients? How do they close the deal? Ask them. They'll be flattered you want to know. They'll be flattered that you want their advice, that you want to know why they're so successful and that the reason you're asking is because you want to emulate them. And then, after you thank them and pay for lunch, ask to meet again in a month, and take them out to lunch again and dive deeper into what they do to get so many clients.

By seeking out rainmaking mentors, you'll learn what works and what doesn't when it comes to building a book of business. Delving into their wisdom and experience will help you avoid dead ends and invest in what works.



## Emulate Rainmakers

Once you learn what rainmakers do, devise a plan that emulates them. Where were they when they were in your shoes? What were they doing? What were they reading? What meetings were they attending? What organizations did they belong to? Rainmaking is a process. You have to evaluate how far along you are in the process and then decide what your mentor can tell you about how you get from where you are to where he is.

Rainmakers didn't get to where they are by happenstance. They had a plan and they executed on it. Find out what plans they had and what they did to get to where they are. And then sit down and draw up your own plan – taking from theirs what works for your style and personality and making it fit your goals and needs.

Always remember, advice from a mentor is powerful. However, what works for one does not work for all. Take rainmaker advice to heart, but customize it to match your style, your niche and your target audience. Stay true and authentic.



## Coaching

Even the best of us rely on coaches and trainers to help us better ourselves and reach our goals. Do you need help developing a personal marketing plan and reducing it to writing? Do you need someone to keep you focused on implementing that plan? Do you want someone to hold you accountable to ensure you take the action steps you outlined? If so, consider hiring an attorney marketing coach.

Firms can hire coaches to help them develop a firm wide marketing program and create a marketing culture where all the attorneys work together to bring in business. Attorneys can hire coaches to help them evaluate their marketing strengths and weaknesses, identify their “A” list of prospective clients, design a plan to pursue those clients, and keep them accountable to sticking to their plan.

Before hiring a coach, do some research. Visit their website, read their articles or blog and ask for some references - satisfied customers whom they’ve helped. Did their advice work? Did these references develop a book of business? Was the coach helpful and responsive? Agree on what services you are purchasing – including how many sessions you’ll have – and what you’ll be paying.

A coach serves two important roles - he helps you focus on what will work, and he will hold you accountable to implement your marketing plan. Having someone to answer to, someone you’re paying, will give you the incentive to pursue and fulfill your marketing tasks and goals.



## Bar Rules and Regulations

As you devise and implement your marketing plan, you must be aware of what is considered ethical marketing and what isn't. As online marketing becomes more prevalent, ethical rules are evolving to address websites, social media and your online presence.

Take the time to read your state's regulations addressing marketing and advertising. Know your jurisdiction's rules and regulations. What may be permissible in one state may not be in another state. What can you say on your website profile? What can others say about you on your LinkedIn page? How can you reach out to others online, and what can you say and not say to them? Who can you friend on Facebook? Can you call yourself an expert? How about all those rating services? What can you say about them on your profile?

And what do bars generally consider red flags? Beware the use of words that create unjustified expectations in the eyes of the consumer. Additionally, you can't use words that are false, misleading or manipulative, and you can't claim expertise or specialization unless you are board certified in that specific area.

If your state hasn't caught up with modern networking techniques, review the ABA rules and keep tabs on other states' rules. There is permissible marketing, and then there is impermissible marketing. Don't get in trouble with the bar by overstepping the bounds of ethics and saying or doing something that can result in a bar complaint and possibly cost you your license.



## HABITS OF AN EFFECTIVE RAINMAKER

### Be Proactive

Your career is in your hands. You can't sit back, bill hours, stay in the comfort of your office and not have a plan on how to get clients and keep them happy. Practicing good law is not good enough. Just because you are good at your job doesn't afford you the luxury of simply waiting for the phone to ring. You should be good at your job – it's expected.

A plan is what makes you proactive and makes you think forward as to where you want to invest your time. A plan plays to your strengths and helps you be disciplined.

In litigation, you're taught to devise a plan to win and to execute it. You don't react to the other side's plan. You force your plan on them. You make them react to your moves. Marketing is a lot like litigation. You need to be proactive in creating a plan, and then you have to implement that plan.

No one is going to ask you to lead their organization. No one is going to ask you to write an article or a column or a blog. No one is going to ask you to speak and to present and to captivate an audience. Do not wait to be invited. Be proactive.

You need to take control of your message and of your brand. You need to get out there and meet people. Get to know them. Let them get to know you, like you and trust you. Join organizations. Write. Speak.

When you go to functions, introduce yourself, network and make an impact. Take charge of your marketing plan because if you don't, who will? It's not going to happen if you don't take the time and if you don't do the work.

Plan, implement and see your efforts through. Networking is a contact sport. Be ready to engage.



## Focus

Shotgun marketing isn't going to work. You need rifle marketing. You need to define the target, take aim and fire. Doing everything, being involved in multiple organizations, writing every article and pursuing every speaking opportunity is exhausting and ineffective. You need to start with what clients you want to attract.

Who do you want hiring you and what cases do you want? Once you decide the cases you want to handle, decide the path between here and there. Random acts of lunch and golf won't further your marketing efforts. You have to have a plan. You have to be focused.

What organizations do those clients belong to? What magazines and trade journals do they read? What websites do they visit? What interests them? What presentations would they like to attend? Once you know where you want to end up you can focus your time and energies on what it will take to get you there.

Pick one or two organizations with which to get involved. Devise a list of those who are in the best position to refer you cases, and create a schedule to meet with them. Pick and choose what publications you'll write for, and speak only at those conferences where the clients you want can see and hear you. Focus your attention strategically on those in a position to hire you. Resist the temptation to be pulled off your path. Learn to say no. Your time is valuable.

The only thing worse than doing nothing is doing everything. It sucks the life out of you and makes you want to walk away from marketing altogether. Decide what fits your schedule, your personality and your goals and do that and nothing more. The rest is just noise.



## Evolve

Your marketing plan is a living document. It needs to evolve to adapt to the realities of your circumstances. Maybe joining that organization wasn't such a great idea after all. Or that column your writing isn't reaching the audience you intended. You need to constantly assess your marketing efforts and be willing to change, and at times, even abandon certain pursuits and start over with new ones. At the end of the day, you want to invest your time and energy into what works for you, what gets you results. If that means changing course, so be it.

You also have to be willing to keep up with the times. For example: Social Media. Years ago, social media wasn't even a thought – but it should be something you pay attention to today. Your plan should have stretch goals, and as you mature as a lawyer, incorporate the new technologies and tools available to you.

You must be willing to evolve, to view your plan as ever-changing. The path from point A to point B isn't always a straight line. There are going to be surprises along the way. Just be prepared to adapt to achieve your marketing goals.



## DEVELOPING RELATIONSHIPS

### It's All About Relationships

Evidence is compelling. Clients hire lawyers they know, like and trust. Therefore, the cornerstone of business development is personal relationships. Top rainmakers have a wide and varied network of people they know and know well. They understand that companies or firms don't refer cases, people do.

If you can reduce legal marketing to one word, that word is "relationships." If you want to invest in yourself and your firm, you must invest in building relationships - solid, trusting, mutually-benefitting relationships, ideally with people in a position to hire you at some point, some day.

Rather than putting pressure on yourself to get out there and find clients, focus on developing relationships, sincere and genuine friendships built around hobbies, interests and occasions – things other than work. Spend time at receptions and conferences, at lunches and meetings, getting to know others who fit within, or have a connection to, your target audience. The greater your network, the greater your referral sources and the more likely you will receive a call or an e-mail about a new matter.

Invest in personal, authentic, meaningful relationships. Solid relationships give birth to the trust that prefaces referrals. If you want business, get to know the people who can refer you the business, and build relationships with them. A relationship comes before every referral.



## Friendships

Pursuing relationships to simply pursue business is craven. When we say business is built on relationships we are not suggesting you get to know others simply to see what they can do for you. That business is built on relationships is a truism. That you want to get to know people with your hand out, not caring about them, but only to get them to help you, is exploitive.

So when we talk about relationships, we mean sincere, real relationships. We're talking about friendships, where you get to know each other, learn about each other's families and careers, each other's hopes and dreams, each other's successes and challenges.

We can sniff out phonies. Salespeople who suffer the small talk to make their pitch. Whose idea of a relationship is a quick sale to line their pockets. That's not what we mean when we encourage you to build relationships.

Build real friendships with people. Pursue that and the business will follow. Just pursue the business and you'll neither make friends nor get referrals.



## Authenticity

Real relationships are based on authenticity. You can't fake it. You can't pretend to care about other people's lives, their kids, their problems and their worries. You can't let your mind wander while they talk, waiting for them to stop to sell yourself and your firm.

You need relationships for business, but pursuing relationships just to get business isn't going to work. A bit of a conundrum. However, if you invest in real, personal relationships, share what you do and who you are, the rest will take care of itself.

The relationship has to be about the relationship – two people who earnestly care for one another, who really want to know what's going on in each other's lives – and born from that relationship, from that trust and mutual respect, will come business referrals because people refer cases to those they know, like and trust.

Yes, you have to do good work. Yes, you need to be an expert in your field. But there are a lot of attorneys who do good work and who are experts in their field. What makes you different when it comes to that individual is that he knows, likes and trusts you. And he trusts you because you're authentic.

Glad handing won't get you sustained business. Build authentic, real relationships and business will follow.



## Face Time

Don't give away the game tickets, go to the game with your clients and prospects. Invest in face time.

You can't build relationships sitting behind your computer. Online marketing can be part of your marketing plan, but only a part. You want relationships with people, you need to look them in the eye, shake their hands and talk to them.

This is for you Millennials – with your MacBooks, iPads and iPhones – with your text messages and your Facebook (I'm sorry, not Facebook – Facebook is for guys like us – whatever the next generation online platform that you all use and that we have no idea about is). Yes, we have something to learn from you about technology. But you have something to learn from us about relationships.

There's something about breaking bread with someone, grabbing a cup of coffee and just talking. Remember lunchtime is prime time. Everyone has to eat. No texting, or checking your phone, or multi tasking – just talking to people, about their job and yours, the playoffs, the campaign, the movie coming out next week – whatever you want.

So please, turn off your computers, walk out of your offices, grab your suit jackets and spend more time talking to people. People who are in a position to refer you business are generally older and they refer cases the old fashioned way – by getting to know you face to face – sizing you up and asking themselves, “Can I trust this person?” You can't do that over a computer. Get out there.



## Increasing Touch Points

Touch points is a marketing term for how many times you make contact with someone. You make regular contact with good friends, less with colleagues and even fewer with acquaintances. “Hey Bill, how’s the job?” With an acquaintance you only ask about their job, because you don’t remember his wife’s name and whether he even has kids, much less what their names are. That’s an acquaintance. Is an acquaintance going to refer you a case? Maybe.

Is a colleague going to refer you a case? You know, John, who’s married to Jill and has two boys in middle school, who play soccer and basketball respectively? He’s more likely to refer you a case.

And how about a close friend? The one you go to happy hour with, who’s working on a novel and bounces plot points off you? If he has a case, he needs help, who is going to call on? That’s how touch points work.

Pick up the phone! Personally invite people to grab lunch or drinks or coffee. Consider following up on meetings with a handwritten note. You don’t see it often, but it’s a classy way to create a personal touch point. The more you reach out to people, the more “touch points,” the closer the relationship and the greater the likelihood the person will refer you a case.

Increasing touch points is simply building a closer relationship with your contacts. Increase your touch points, and increase the likelihood of referrals.



## Love Networking

Not every lawyer is a natural at networking. Nothing scares some people more than having to work a room. But networking shouldn't be about shaking every hand like a politician – it's about locating your targets and having sincere conversations with them while developing a mutually-beneficial relationship.

In the Harvard Business Review article titled "Learn to Love Networking," Tiziana Casciaro, Francesca Gino and Maryam Kouchaki state that networking is a necessity. They cite research where networking not only leads to more business opportunities, it also improves the quality of one's work and job satisfaction.

To change one's attitude toward networking, the authors recommend that we (1) shift our focus from it being a chore to it being an opportunity for learning and discovery; (2) identify common interests with those we meet, and work on common tasks with them through organizations; (3) think about what you have to offer others, including your gratitude; and (4) find a higher purpose, whether it's supporting your firm or helping your clients.

Prior to a conference or event, determine a handful of people you would like to target. Do your research in advance. Use social media or company bios to learn about their interests and hobbies. Upon meeting, ask questions and, most importantly, listen!

By changing your attitude toward networking, you can find it not only palatable, but truly enjoyable. Getting out there - talking to people, asking how they're doing, what they're doing, their interests – that's networking – and if you don't like doing that, or better said, if you don't get to learn to like it – you're not going to meet people who are going to refer you cases. Learn to love networking.



## Handwritten Notes

There was a time when other than speaking to a person face-to-face, the mainstay of communication was writing letters. There were no e-mails or instant messages or Facebook accounts. There were no computers or Blackberries or cell phones. There was just a quill, a bottle of ink and a piece of parchment. And with these simple implements, relationships developed and flourished. It is how John and Abigail Adams buoyed each other up during this country's fight for independence. On March 31, 1776, Abigail wrote John, "I have sometimes been ready to think that the passion for liberty cannot be equally strong in the breasts of those who have been accustomed to deprive their fellow-creatures of theirs." Who writes like this anymore? What has happened to our gift to move others with our words? If you recapture the lost art of letter writing, you will find your personal and business relationships blossom.

No one writes letters any more. So when someone receives a written letter in the mail, they cherish it. Those letters are often kept. Read again. Put away, only to pulled out to be read again.

If you want to make an impression, buy yourself stationery - professional looking stationery with your name and address across the top of the page and on the corner of the envelope – and commit to writing at least one letter a week.

Pick an old acquaintance or an executive you met at a networking event. Sit down at your desk, with your stationery and your letter writing pen (I would suggest to make the experience complete, go out and splurge on a nice pen that you only use to write letters), and draft a letter.

The first few letters are difficult. With e-mails and word processing, it is hard not to second guess every word you put down on paper. It will take some time to learn to write letters. Some of you will find the experience too bothersome to even pick up. Others will throw down your pen in frustration and your stationery will collect dust in the bottom drawer of your desk.

But for those of you who stick with it, writing letters will become a natural and regular part of your life. You will find that these letters will forge closer relationships with family and friends. You will also find that those letters will forge closer relationships with business prospects and clients. In short, the forgotten art of letter writing is good for you and good for business.



## Stay in Contact

So you meet someone at a conference or at a cocktail hour. You guys hit it off, you have something in common, you're in different practice areas, so he may have cases to refer to you and vice versa, and you exchange business cards. Now what?

When you meet someone who may become a referral source you need to nurture that relationship. Follow up with a call and schedule a lunch. And after lunch, stay in touch. Place the periodic call or e-mail. Get together for drinks and make a point to see each other at the next conference or cocktail hour.

Relationships are organic. They grow or they die. Proper care and feeding is required.

In any relationship, you have to be thinking when is the next time I'm going to have contact with this person? When's the next conference you're going to run into each other? When's the next reception? If it's not in the horizon, and your contact is local, schedule a lunch. Perhaps get together for coffee. It costs less than \$10 and can take less than an hour.

For folks who aren't local, call them, e-mail them, send them a handwritten note or a token gift like a magazine with an article they would like or send them a Starbucks gift card to have a coffee on you. Always work on building the relationship.

Find ways to stay in touch by sending a note congratulating the contact on a promotion or new job or major life event. And make sure your notes stay out of the holiday traffic. Everyone sends holiday cards during December. Want to not get lost in the shuffle? Choose a different time of year to send a "thinking of you" card.

Out of sight, out of mind. Always find way to stay on the radar.



## Reconnect

Because relationships are not static, and most of us are terrible at relationships, there are a lot of folks with whom we have lost touch. Old friends, former colleagues, co-defense counsel from that big trial. What happened? You would hang out, crack jokes, share war stories. You have to get that back. You need to reconnect. “Hey, yeah, I know it’s been a while. No, I don’t need anything. Just calling to catch up. Oh yeah, my son David, yeah, he’s all grown up now. He’s headed off to college.”

It’s that simple. Pick up the phone and reconnect. But do so in a way that’s authentic, not opportunistic.

Making new contacts, developing new relationships, starting from scratch, takes a lot more time and energy than investing in an existing relationship that just needs some care and attention.

Go ahead, pick up the phone.



## Congratulate Contacts

If you're following the legal news, as you should, you're reading your Bar's newspaper or magazine, you're reading your local news publications and you're receiving e-newsletters from national bar associations. In them, you'll find that contacts of yours have changed firms, gotten promotions, gone in house, won trials, gotten elected to leadership roles and have spoken at conferences. Everyone likes to be acknowledged. Everyone enjoys the pat on the back and the knowledge that others recognize their accomplishments and hard work.

Take the time to send a handwritten note and let them know that you read about them, that you thought it was great what they did and you wanted to let them know it was great. It only takes a few minutes of your time, but it will mean a whole lot to the recipient of that letter.

Monitor the local newspapers for interesting stories about your clients' children. A phenomenal rainmaker made it a habit to keep up with the local news, and when he recognized a child of one of his clients scoring the winning touchdown or making honor roll, he clipped the article, framed it and sent it to the client's family. A genuine and unique way to stay in touch.



## Follow Up

Studies show it takes 8 to 11 impressions to convert a prospect into a client. Once you make a contact and you follow up, you need to continue following up. Plan on reconnecting with your contacts quarterly - at a conference, by phone, by e-mail, drinks, letter, coffee or a meal.

If you make it part of your daily marketing plan to remain in touch with your contacts, then reaching out to them each quarter is not nearly as overwhelming as it may sound. You write two handwritten notes, send two personal e-mails and schedule a coffee and in twenty minutes you've kept in touch with five contacts.

Keep a list of your contacts and plan on going through that list each quarter. They shouldn't only hear from you when they receive your holiday card which they'll promptly deposit in the trash. Make the most of receptions, mixers and networking events to keep in touch with your contacts.

For those contacts who aren't local, find out when their schedules and yours may intersect. Make the most of depositions out of state to schedule meetings with your contacts, to catch up over coffee or lunch. When attending an out-of-state conference, do the same.

Regularly following up takes time and planning, and it means making the most of your time when you travel for business. Once you've gone through your list and checked everyone off, wait until the next quarter starts and begin again.



## Law School Yearbook

If you kept your law school yearbook, pull it out of storage and skim through it. Who belonged to which organization? Who was in your section? Who did you attend class with? Who edited your article in law review? Who was your partner in moot court? Some you have kept touch with, most you have not.

For those you knew well, look them up online and see what they're doing. Send an invitation on LinkedIn, send a friend request on Facebook, or send an e-mail. Schedule coffee, lunch or drinks and catch up. What are they doing? What have they been up to? What cases are they handling? What trials do they have coming up?

A relationship with a former classmate is easier to develop than a relationship with a new contact. If you did well in law school and were a nice, pleasant person, your former classmates should have a favorable opinion of you and would likely consider you as someone who could handle their matters.

Reach out to your law school classmates and add several to your growing contact list.



## Former Classmates

In addition to connecting with former law school classmates, reconnect with college and high school classmates.

Through Facebook, LinkedIn and other online social media, you can reconnect to those with whom you pulled all nighters as a political science major, or teammates from your high school soccer team. Again, these are individuals with whom you ate lunch in the cafeteria, attended school events and participated in clubs or the student body government. They knew you, trusted you, laughed and cried with you. You shared your dreams and your plans and you graduated together. You want to hear from them, and they want to hear from you.

Reconnect, catch up on old times and make them part of your network. Again, the foundation is there for a long term, trusting relationship which may lead to referrals.



## Become a Connector

As an attorney, you are in a place to help others. One of the most important services you can provide others is putting two individuals who share similar interests and desires together so that they can work on a common goal. Marketing and communication folks call it being a “connector.”

Many of you will receive your share of e-mails and calls from friends and colleagues asking for help with a charity or organization. If you don't already have a pet project you work on, consider helping out with one of these worthy endeavors. And if you already have your hands full, consider putting these folks in touch with friends who share their interests and who would enjoy lending them a hand.

Try to give back, and when you can't or prefer not to, take a minute and think if you know someone who would jump at the opportunity, someone who didn't get the e-mail or phone call you did. Perhaps by putting a post on LinkedIn or Facebook or sending a tweet you can let others know of a worthy cause which they would never have heard of.

Always have your antenna up and be ready to connect those who need to be connected. Bringing folks together is a great and easy way to give something back and build goodwill among your network.



## Personal Conversations

Conversations that build relationships go beyond what you do and how you can serve a prospective client's needs. Real conversations get to the heart of the other's likes and dislikes, family and hobbies, interests, goals and plans. They take time and they require your full attention.

Nurture sincere, personal conversations. You're not looking for an opening to promote yourself and your firm. You just want to hear what the other has to say and let the conversation go where it goes. Personal conversations take time and they require you to stop thinking about the next person you want to talk to at the cocktail party or reception, and focus on the person you're speaking with.

Whenever you connect with a contact, ask them about their jobs, families and hobbies. Take the extra few minutes to talk about things important with your contact. It's the same you would do with a close friend.

Treat all your contacts as you would your close friends, and your conversations with them will be infused with the attention, detail and concern they deserve.



## Listening

Eighty percent of your conversations should be listening and twenty percent talking. You have two ears and one mouth. Ask questions and really listen attentively to the answers.

You want to actively listen to what others say, comment on their thoughts, interject when necessary and let them say what they want to say. Sure, you can talk about yourself and your practice. Your question to them about what they do, will be followed by them asking what you do.

Each of us wants to be heard. Each of us wants to know that what we say matters. Each of us wants others to respond to what we say, actively listening to our stories, concerns and thoughts. That requires your attention and focus, seeking clarification when necessary to get more information and summarizing and paraphrasing where appropriate to show you are engaged and understand what you're being told.

We remember those who listen to us, who really listen to us, and show care and concern about what we have to say. If you want to connect with your contacts and have them remember you, listen the next time they talk instead of taking every opportunity to talk about yourself.



## Remembering Names

Our names mean a great deal to us. We perk up when we're addressed by name, and we become annoyed or dismissive when someone forgets our names.

When meeting someone new, make an effort to memorize their name. Repeat it silently in your head several times and associate the name with the face. Ask for their business card and study the name on it. Repeat the person's name when ending the conversation. Find a way to associate the name and face in your mind so the next time you meet you'll be able to say hello by name. And make sure you're pronouncing it correctly. Ask them to help you pronounce it and after the conversation is over write it phonetically on the business card they handed you.

Most of us are terrible with names. If you're great with them, you'll stand out to your contacts. And, if you aren't good, well thank goodness for name tags! Make sure to master the fine art of the name tag glance.



## Firm Alumni

The larger your firm, the greater the number of attorneys who have come and gone. Some have moved onto other firms and others have gone in-house. If you worked with them, they know you, they know your work product, and they like you and would consider referring you a matter when they have one. But if you don't stay in touch, they likely will forget you. So make an effort to keep in touch with them.

Remain friends with those who choose a different direction. Go out to lunch, catch up through phone calls or e-mails and keep tabs on Facebook and LinkedIn. These are folks with whom you tried cases, celebrated birthday parties and went to lunch.

Staying friends with past colleagues is easy, it just takes time to periodically check in and catch up. You can see how they're doing and send them copies of articles you've written or let them know about an upcoming presentation you're giving at a conference.

Remember, it's about personal relationships. Firm alumni can be among your best and most reliable referral sources.



## Thank Your Referral Sources

When you get a referral, always thank your referral source. Whether or not you get business from the referral, always show your appreciation to the source. Call them up and tell them you appreciate them thinking of you and follow up with a personal handwritten note. Send them a gift as a token of your appreciation. It could be a gift basket, nice bottle of wine or something engraved, like a pen, letting them know that it means a lot that they picked you out of all the attorneys they know. (Of course, check your bar rules about the ethics of sending gifts to referral sources). They'll remember the gesture.



## YOUR BRAND

### You Have a Brand

McDonalds, Coca Cola, Apple and Google are some of the most recognized brands in the world. Believe it or not, you have a brand as well. And, the clearer you are about your brand, the more you distinguish yourself in the market.

You need to take control of your personal brand to define for others how your skills and expertise can solve their problems. How are you positioning yourself in the marketplace as an attorney with the skills and expertise to resolve matters favorably and efficiently at a reasonable price?

Take steps to be perceived as an expert in your field, a thought leader, who writes and speaks on the issues that matter to the clients you want to attract. That will favorably shape your brand in their eyes.

Your brand should tell others what you do and what you're good at in a clear, concise fashion. When you think of Apple you think of innovation and outstanding design. What do others think of when they think of you? You need to answer that question through your marketing.

Developing a niche practice and sharing your expertise through networking, writing and speaking goes a long way in creating your brand. Remember that your brand is yours, and you have to define it on your terms, otherwise it will become muddled and confused when others are trying to determine if your brand meets their needs.



## Everything You Do

Everything you do builds, undermines or muddles your brand. Once you know what brand you want to convey to prospective clients, everything you do must advance that brand.

When you write - your articles, blog posts and e-books should advance that brand. When you present at a luncheon, speak at a conference or moderate a panel discussion, what you say should advance your brand.

Your law firm profile should emphasize your brand through your accomplishments and your personal description. The organizations you belong to should be ones that are in demand for your brand and allow your brand to shine.

Your reputation, your expertise, your demeanor, your writing, your advocacy, and your attire – they all contribute to your brand. Everything you do should be seen through the spectrum of your brand and you should ask - does it reinforce my brand? If the answer is “No,” think hard before taking that speaking or writing opportunity or joining that organization.



## Building Your Brand

Once you've defined your brand – let's say, the bet-your-company trial lawyer for product liability cases – you have to build that brand. Obviously, having a track record handling those matters goes a long way.

Nothing says expertise like experience. But let's say you haven't handled many, if any potentially multi-million-dollar product liability cases. If your firm handles those matters, ask to second chair those trials or get involved in some other fashion. Write on product liability and trial skills topics. Start a trial skills or product liability blog. Teach trial skills at trial boot camps, or start your own through your local bar association. By teaching trial skills you come across as a skilled trial attorney who not only knows how to try cases but is such an expert that you can teach others how to do it too.

The more you write on product liability and trial skills issues, the more you speak and present on these topics, the more you're involved with organizations where clients are seeking out product liability trial counsel, the more you will build your brand as a product liability trial lawyer that others will want to hire.

Also consider how things like your wardrobe contribute to your brand. Are you trendy or traditional? Are you Brooks Brothers or Armani? What you wear - the glasses, the shoes, the clothes - add to or detract from your image.

Remember, what doesn't build your brand, confuses or muddles it.



## Monitor Your Digital Footprint

Periodically, Google your name and view the results. Anyone thinking of hiring you is more than likely going to do the same. It's important to see what those prospects see when researching you. Does the information on the Internet properly reflect your brand?

Your firm website and social media sites, such as Twitter, Facebook and LinkedIn, will likely be among the first listings. As you use social media, ensure the information you are putting out there is how you want to be viewed by others. Skip the wild party pictures. Refrain from being overly opinionated about politics or issues of the day. Ask yourself, how does this add to my personal brand?

Additional listings may include bylined articles, links to presentations you've prepared, attorney ranking sites, blog posts, newsletters and verdicts.

Take a close look at where you're mentioned and see if anyone is writing anything negative about you, perhaps in an attorney review or on a blog post. If there are negative references about you that others may view when they do their due diligence on you, see if they can be corrected. Perhaps the person who posted it may be willing to take down the post or modify it. Perhaps hearing from you may make them reconsider their negative comments.

In our Yelp society, where everybody is rating everyone and everything, you need to be keeping an eye on how you are represented in the digital world.



## Update Your Website Bio

Your profile on your firm's website should be a living document, one that grows with your experience and reinforces your brand. When's the last time you've updated it? When's the last time you've considered putting it through an overhaul to make sure everything you say on it speaks with one voice and sends a single message about who you are and your expertise?

Every time you speak, or write an article, or receive an accolade, or secure a leadership position, ask yourself –“Should I include this on my firm profile page?” If it builds your brand, include it. Also, your profile should begin with a paragraph or two about yourself explaining why you are the attorney that meets the needs of the types of clients you're looking to attract. It should tell a story about you, your expertise and why you're the one your prospective clients should hire.

Prospective clients read firm bios. In fact, it may be the only thing they read about you when deciding to hire you. Make sure you put your best foot forward when crafting it.

Perhaps even more important than the verbiage on your bio is your picture. People are visual. If someone doesn't have time to read a bio, you can be assured, at the very least, they will view your photo and quickly develop an impression. Make sure you look like a lawyer!



## Your Firm's Website

When's the last time your firm updated its website? It's been a while, hasn't it? Does it look dated? Is it easy to navigate? Are the firm pictures up to date? Is everyone's profile up to date? How about your firm's logo? Your tagline? Is it fresh? Do they represent what your firm is? What it does?

Just like your personal profile, your firm's website needs to grow and evolve. Your prospective clients are going to look up your firm, and they're probably going to do it from their phones. Is your website mobile friendly? Does it look vibrant? Does it look professional?

If prospective clients see you're not willing to invest time and energy into your firm website they may think you'd handle their matters the same way. You may not think you have much say in your firm's website, but try! Convince your firm managing partner to go to a professional web company and update your website. Visitors should be able to access your published articles, videos and presentations, in addition to your blog and Twitter feed.

Take some time and visit the website of your competitors. What do they include? Just importantly, what don't they include? How can you navigate on their websites? What bells and whistles do they have?

Keep up to date with current technologies and develop a plan. Send an e-mail to the firm asking for everyone's thoughts and have a meeting to discuss what changes should be made.

Websites should be updated regularly to catch and keep the interest of prospective clients.



## Social Media

Your social media should be a reflection of your brand. Everything you say on social media – your LinkedIn profile, your Facebook posts, your Tweets – they all build or tear down your brand.

Generally speaking, Facebook is for friends and family. LinkedIn is for professionals. Twitter is for sharing articles and information related to your brand. Before moving forward on any social media platform, consider the privacy settings carefully. Do you really want to give just anyone access to photos of last Sunday's barbeque with the neighbors?

What you say on social media matters. It's there for everyone to see, including prospective clients. They want to know what you say, what matters to you, how you express yourself and what you express yourself on.

It's ok to have an opinion, it's ok to have views and support them, but appreciate that what you say reflects who you are and how you're perceived, and therefore those of you who have strong opinions about politics, for example, keep those opinions tempered.

It's surprising to see how many through their Facebook posts and Tweets go after others because they hold different opinions than their own. A post you disagree with isn't an invitation to go after the person who posted it. We all run into people in our daily lives that we disagree with and we keep our mouths shut. But somehow, we believe the rules online are different, and we're entitled to say what we want to whom we want.

Social media is a reflection of your brand. Sure post pictures of your vacation. Brag about your kids. But that political fight you know you should avoid – just avoid it. Even if you get the last word, you're only hurting yourself.

And, just because you lock down your Facebook's privacy to only allow friends and family, doesn't mean the information isn't there. Just as every mic is a live mic, social media is live and available for the world to see at any time with a simple screen capture and share from a disgruntled friend, colleague or family member. Be mindful.



## Increase Visibility

You want to publicize your brand and make it known. To do that, you need to increase your visibility.

Focus your efforts on activities that will provide you the most exposure to the clients you want to attract. What organizations do they belong to? What seminars do they attend? What webinars do they register for? What publications do they read? What networking events do they attend? You want to regularly be in front of them, talking to them, speaking to them, writing what they read, advising on issues relevant to them. They may not notice a solitary article or a single presentation, but once the number of touches you make reaches a critical mass, they will take notice and start considering you as someone who can handle their matters.

Enough contacts, and they'll become part of your network, where you can reach out to them regularly through coffee, meals, correspondence or phone calls. Get out there, and get out there in a thoughtful and regular basis, so others can discover you and what you can do for them.

Additionally, don't be afraid to promote yourself and toot your own horn when appropriate. It not only helps increase your visibility, it showcases your expertise and proven track record.



## Stay Focused

Remember to avoid random acts of lunch and golf. Your brand has to be focused.

You can't be all things to all people. So often lawyers get distracted and lose focus. They tend to flit around like hummingbirds from flower to flower.

You need to define your brand narrowly, understanding what clients your brand will attract, and then work on developing and building that focused brand. Always ask yourself: does this function, conference, organization – advance my brand? Does it centrally advance my brand or does it do so more on the periphery? Don't accept speaking engagements or other opportunities that take you off point. Your time is valuable.

Not everything you do has to advance your brand, but the more energy you spend away from it, the less you will develop it.



## Stay on Message

Whenever introducing yourself and your firm, have something to say and stick to it. Whether it's in your firm profile, a bio you include with a paper for a presentation, something you add to the end of an article you wrote, or when talking about yourself at a conference or networking function, always say the same thing.

Your message should be clear, concise and consistent. Everything you do professionally should bolster and support that message, so when you say it, others can see it for themselves. A consistent message builds brands.

To you, you'll sound like a broken record. However, the Principles of Adult Learning theory suggests that an adult has to hear something seven times before they take action. You may think you said it once and people absorb it and get it. Wrong. Repeat and repeat and repeat.



## HAVE A PLAN

### Start with the End in Mind

Absent of a plan you are just drifting with the tide. Know where you want to go and have a plan to take you there.

In his best-selling book, "The Seven Habits of Highly Effective People," Stephen Covey recommends that we "begin with the end in mind." You start with an image of where you want to end up – what clients you want - and devise a plan on how to get there.

What clients do you want to work for? What cases do you want to handle? What do you want to be an expert in? Once you know where you want to end up you can figure out how to accomplish your goals.

Without defining what the end looks like, you'll never get there. Your efforts will be scattered at best and counterproductive at worst.

Sit down at your computer and answer the following question - what do you hope to accomplish by having an attorney marketing plan? The answer to that question will direct where you take your plan.



## Be Realistic and Achievable

A lot of young lawyers have unrealistic expectations and put too much pressure on themselves. They expect goals to come quicker than they do. Work on your habits, play to your strengths and put yourself in front of your target audience. Adjust your expectations.

When setting goals and planning how to achieve them, be realistic. You're not becoming an expert in a field overnight. You're not bringing in a \$1,000,000 of business without time and effort. You should set yearly goals with concrete, reasonable steps to achieve those goals.

You know what your strengths and weaknesses are. You know how much time you can dedicate to marketing. You know where you're starting from and you reasonably know what steps to take to accomplish your goals. You know you're not going to write an article a week or speak every month. But perhaps you can blog once or twice a week and speak 3-4 times in the coming year. You're not going to meet a contact for lunch or coffee every day, but perhaps you can do so weekly.

There needs to be a balance between doing too little and doing too much. This is a marathon, not a sprint. Create reasonable goals with bit-sized action steps. Doing so will make marketing less daunting and will increase the likelihood that you follow through.



## Mission Statement

Most companies have mission statements. They proudly display them on their websites, engrave them in granite at their headquarters and tout them in their marketing materials. They are a company's heart and soul reduced to a few sentences, sometimes a few words. This mission statement directs the company and helps it stay focused.

You too should have your own mission statement. Take some time with a pad and a pen and brainstorm what your mission statement should be. What are your goals? What are your values? Who are you and what do you want to become?

Think through your personal mission for your career and reduce it to writing. It shouldn't be more than a sentence or two, maybe a couple of phrases, possibly even just a few words. Keep it honest, keep it brief and keep it handy. Tape it to your monitor or stick it on your refrigerator door. Your mission statement will help you keep your actions and thoughts directed toward achieving your marketing goals.



## The Vision Thing

If you want to grow your book of business, you need to become a leader in your firm, community and trade and bar associations. In any organization, there are the followers - the ones who do as others tell them, who choose not to think for themselves and are content to take orders.

Then there are the managers, who direct others on how to implement someone else's idea.

And then there are the leaders, the ones who “start with the end in mind” and devise a plan on how to get there. They have the “vision thing,” as some call it – they think big picture, they see what others don't and aren't afraid of the expanse of their dreams. They are the ones who help organizations take huge leaps forward.

Most organizations lack the leadership that they crave and need. Fill that void, and you will transform your organizations and attract clients.



## Choose a Target Market

When preparing a marketing plan, choose your target market. What cases do you want to handle? What clients do you want who have those cases? Do you want to be an employment lawyer? That's a broad area. Do you want to be a generalist in employment law, or do you want to drill down in a subspecialty, like the Fair Labor Standards Act? What types of clients have lawsuits involving the FLSA? What organizations do they belong to? What do they read? What seminars do they attend?

By choosing a target market, you focus your energies on pursuing clients in that market, and save time engaging in efforts which aren't directed to those specific prospective clients. It makes your practice easier to market, because you're not all things to all people. You have specific cases you handle and that niche practice allows you to immerse in an area and target those with needs in that area.

Many attorneys, though, have a varied practice, handling various assortments of matters. If you do, then you need to focus your marketing energies on two or three areas, and decide how you're going to market yourself in them.

By choosing a target, you know what you're aiming for and are more likely to hit the mark.



## Play to Your Strengths

There is not one path to being a successful rainmaker. Some do it because they are gregarious and personable. Some do it because they're natural leaders. Others are great speakers, and can hold an audience in the palm of their hand. Some are prolific writers, producing reams of copy for their blog, firm newsletters, bar association publications and trade journals.

Each attorney has their own skill set. You need to do an honest assessment of yours and decide what marketing efforts play to those skill sets. Do stuff you are good at, do stuff you enjoy.

If you want more exposure, you're going to have to get over your stage fright to speak at conferences. And if you want more bylined articles, you'll need to get in the habit of reading others' articles to see how they say what they say. But if you love leading organizations and don't enjoy speaking, you can organize conferences and get others to speak. If you want to be involved in a publication, but don't want to write articles, you can edit them.

You need to write down what skill sets of marketing you're good at and make the most of them. That doesn't mean you ignore other skill sets, but you focus your energies on your natural talents and exploit them to develop your brand. You will have more success if you play to your strengths than trying to improve your weaknesses. Always play to your strengths.



## Put It in Writing

When creating a personal marketing plan, you want to reduce it to writing. You want a living document which spells out your goals and the steps you plan on achieving them. By having it in writing, you can keep track of your progress and see in black and white what is working and what isn't, allowing you to modify it.

There's something about writing out a plan which makes it more concrete, more real, more significant. And, research shows when you put it in writing, the chances of implementation skyrockets.

You're more likely to follow through if you have a written plan that you can compare your progress against. And once it's on paper, you can take a closer look, and see whether any goals should be tweaked, tasks deleted or added and the timetable expanded or shortened.

A written plan can be shared with others in your firm so they can see your plan, provide input and hold you accountable to execute it. In fact, everyone in the firm should reduce their plans to writing and circulate them to the other attorneys, so you can all see what others are doing and get some additional ideas for your own plan.



## Prepare Personal Marketing Plan

Once you've decided to reduce your plan to writing, consider the following:

- Play to your strengths and personality
- Be consistent with your firm's goals and objectives
- Focus your attention on developing your expertise and relationships with clients you want to attract
- Keep it simple and realistic
- Be as specific as possible – who, what, where and when
- Be flexible

In the plan, include:

- Your areas of practice, the fewer the better
- Your target audiences, the fewer the better
- Your top five clients
- Your "A" list – at least 15 contacts with whom you will proactively build and enhance your relationship over the next 12 months (current clients, prospective clients, referral sources, other)
- Activities to build closer relationships with your "A" list (site visits, coffee, lunch, handwritten letters, meeting at conferences, etc)
- Organizational involvement –what organizations you want to belong to and lead, and your plans in the organization for the next 12 months (bar associations, trade and industry associations, charities)
- Speeches and seminars you want to present in the next 12 months
- Articles or books you want to write in the next 12 months
- Your online presence and social media
- Time commitment (in terms of hours per week, month and year)
- Budget requested from firm for the next 12 months (also include what you're willing to contribute from your own pocket)

Sign and date it to make it official. You will refer to this document regularly and modify it as necessary.



## Compare Others' Marketing Plans

So you have a marketing plan – why keep it a secret?

As a firm, you should be coordinating activities and playing off each other's strengths. This is best done by sharing plans.

Each attorney in your firm should prepare their own marketing plan and once they do, they should be circulated. What you'll see is the opportunity to cross market, to tag team organizations, to co-speak on topics, to co-write articles or populate blogs.

To avoid overlap and saturation in the same markets, take time to see what other lawyers are doing so you can collaborate and make the most of all your efforts. Also, others' plans may give you ideas on how to tweak yours, perhaps an organization you hadn't thought of joining, or a prospective client you already know, or a publication with whom you have a relationship with the editor.

The individual attorney marketing plans all feed into the firm's overall marketing strategy and to do so, attorneys should see, comment upon and discuss each other's plans for their own benefit and the firm's. There are many different paths to the same goals, and others paths may help direct yours to the goals you're seeking.



## Contribute to Firm Marketing Plan

Just as attorneys should have their personal marketing plans, the firm should have an overall marketing strategy and plan.

Much of the same analysis used to create your personal marketing plan would be used to create a firm wide plan. The leaders of the firm should get together and discuss the firm's practice areas and clients, and how it wants to focus its efforts to build both.

What's the firm's mission statement? Its tagline? How about its website? How can it be improved? What existing and prospective clients should be targeted and how? What organizations does the firm want its attorneys involved with? Where do they want them to speak? What publications would they want them to write for? How about a firm newsletter? Firm press releases?

As with personal marketing plans, a firm plan should be discussed, debated and reduced to writing to provide guidance to individual lawyers want to include in their personal plans.



## Develop a Firm-Wide Marketing Template

To ensure every attorney in your firm is working from the same playbook, your firm should have a standard marketing template for your attorneys to complete. As a young lawyer, consider taking it upon yourself to develop that template.

- Name
- Areas of practice
- Practice Group
- Target audiences
- Top five clients
- “A” list activities to build closer relationships with “A” list
- Organizational involvement
- Speeches and seminars
- Articles or books
- Online presence and social media
- Time commitment
- Budget

Before they complete it, they should be provided the firm marketing plan (which hopefully they contributed to) to provide them some guidance.



## Marketing Budget

Marketing costs money. You travel to conferences, take others out to lunch, buy them coffee or drinks.

It's important before you start the year that you prepare a budget for your marketing expenses for the year. If you belong to an organization, and they have two conferences a year, do you plan on attending both? What is the approximate cost of airfare? Hotel? Meals? The cost of the program? Are you planning on client site visits? How often are you going to invite contacts for coffee? Lunch? Dinner? Drinks? Do you belong to a board? Is there a fee that accompanies that? Any fundraising obligations that may cost your firm?

Sit down, and write out all your expected expenses for the coming year. Be thorough and reasonable. Then decide what portion of those expenses you plan on covering. Perhaps the firm covers your organizational expenses, including travel and registration, but you offer to pay for coffee and meals with your contacts.

You would be surprised how willing your firm is to pay for a thoughtful plan to market yourself. Many firms will applaud and encourage your efforts. The fact that you take the initiative may be enough to convince your firm to fund your marketing plans. And, if the firm isn't willing to invest in you, maybe it's not the right place for you.

Taking a close look at what you expect to spend over the coming year will make you take a hard look at your commitments and help you decide whether the payoff justifies the expense.



## Track Your Time

Peter Drucker, management expert and one of the leading business writers of our time, said, “What gets measured gets done.”

It’s important to track how much time you’re spending on marketing. It’s not necessary to track every tenth of an hour as you do your billable work. Rather, just generally keep track of how many hours each week you’re spending building relationships with prospective referral sources. You may find that you’re spending too little time, or perhaps spending too much time on activities with a low rate of return.

Also, your firm should know how much of your personal time you’re dedicating to help grow the firm and its client base. What’s a good rule of thumb for how many hours a year you should spend marketing? 200 hours for partners and 100 hours for associates. Of course, the more time you spend, the greater the number of relationships you will build and the deeper those relationships will be. If you make marketing part of your daily work life, you will find that you can easily achieve, and surpass 200 hours a year.

To go even further, the American Bar Association suggests in its “Model Diet for Associate Attorneys” that you devote 400 non-billable hours to things like service to your firm and profession, pro bono, professional and client development and the like.



## Track Your Progress

When running a marathon, you don't complete 26 miles coming out of the gate. There's mile one. Mile two. Mile three. And, each time you reach that next mile, you've taken another step toward the finish line.

To help keep your marketing plan on track and not get lost in frustration, you need to set benchmarks and be specific. Have a detailed plan to make it happen. Specificity allows us to check the box and move on. And, always, always track your progress to see what is working and what isn't.

Are the organizations you're active in providing you access to the types of referral sources you want to meet and have relationships with? Are you reaching your intended audience with your speeches and presentations? Are your articles getting noticed by decision makers?

Not only track your progress of actual referrals you receive but of prospective clients you have met and with whom you have developed relationships. Growing and expanding your network with prospective referral sources who are in a position to refer you cases and who have grown to know and trust you is definitely progress you should track.

You may find your "A" list has grown and that you have developed closer relationships with most of them. Perhaps you have developed a reputation as an expert in a field through your presentations and your blog. Track that. You want to see how far and in what manners you are advancing toward your marketing goals, even if it doesn't mean actual cases through the door. Develop relationships with contacts so they become referral sources who send you cases take time.

Keep track of your progress of building and strengthening those relationships.



## Accountability Partner

After you're done writing your personal marketing plan, find another attorney in your firm who prepared one, and then agree to hold each other accountable to make progress on your plans. Meet once a week in the office and let each other know what you're doing, what you're planning on doing, any changes you've made or plan on making to the plan, and what the next steps are.

By having someone hold you accountable you'll find the time each day, even if it isn't much time, to take action steps to advance your goals. And by talking it out, you have someone's advice about what's working and what isn't. And of course, you can do the same for them. It's an opportunity for both of you to keep the other honest, to keep each other focused and on track.

In fact, your firm may want to implement monthly meetings where the attorneys go around the room and share what they're doing to market themselves and the firm. This process will spur ideas, suggestions and advice on how to fine tune your plan.



## MAKING TIME

### The Non-Billable Hour

As attorneys, you focus your efforts on the billable hour – you are hardwired to the billable hour. How many hours did I bill today? This week? This year? How many hours have I billed as compared to the other attorneys in the firm? How close am I to reaching my bonus? To expanding on it?

This focus makes the non-billable hour a second class citizen. It's something that gets pushed to the back of the line and receives our scant attention. And it doesn't help that many firms don't recognize or reward the non-billable hour. The problem with this, though, is that the non-billable hour is what will provide you autonomy not to be a slave to the billable hour. It will be the means to developing relationships with those who will send you the business to be your own boss, provide you financial security and flexibility where the billable hour is not the only measure a firm takes of you.

You need to elevate the non-billable hour above the billable hour, because the billable hour doesn't lead to freedom, only the non billable hour does. The non-billable hour grows your firm, your practice, your client base, your income and your options.

And just how much time should be non-billable time? The ABA's Model Diet for Associate Attorneys recommends 400 hours per year.

Stop thinking of the non-billable hour as a dirty word -- it's your best friend. Billable hours are important for today's income, but what you do with your non-billable time determines your future.



## Time Management

If you're going to balance the billable and non-billable hour, you need to manage your time. You need to include in your calendar your marketing activities and learn to do billable work when you travel to conferences or seminars. Laptops and iPads are ubiquitous.

When traveling to a conference, plan ahead so you know what work you can take with you and work on between networking events and meals. Calendar your conferences at the beginning of the year so you can see how much time you will be out of the office. Calendar a weekly lunch, coffee or happy hour to meet with contacts. Calendar time to write letters, e-mails and make phone calls to clients. Put your marketing activities on your calendar so it becomes part of your routine and you learn to balance your billable work with your marketing efforts.

When you see your activities on your calendar, it will help you organize your day.

For example, a week could look like this:

Monday	Attorney Networking Breakfast	7:30-9:00 am
Tuesday	Personal hand written notes	7:30-8:30 am
Wednesday	Call contacts	6:30-7:30 am (car ride home)
Thursday	Work on article	7:30-8:30 a.m.
Friday	Lunch with former classmate	12:00-1:30 p.m.

Schedule events in the morning before your day gets started and case and client demands take hold.

Also, make the most of your drive to work and drive home (hands free –no typing phone numbers or text messages while driving). Marketing may take the specter of a second job. Tame it by managing it by managing your calendar.

Take advantage of the numerous apps out there that help track your time. And, really become disciplined in managing your time efficiently. Remember, in the end, it's you who will pay for sloppy time management.



## Avoid Scatter Shot Marketing

To make the most of your time, avoid one off events or scatter shot marketing. Don't attend a luncheon of an organization you're not involved with or have no intention of getting involved with. Don't attend a networking function where everyone is shoving a card in your face and you have no intention of following up with any of them. Don't have lunch with every LinkedIn contact you have. Avoid those random acts of lunch and golf. Be selective.

Before spending any time meeting someone for lunch, joining an organization, writing an article, or sending a personal letter, ask yourself how this activity advances your overall marketing plan? Does it build your brand? Does it deepen your expertise? Does it build a relationship with a prospective client who will refer you a case you want to handle?

Your marketing should be sustained and focused. Remember, you can't be everywhere trying to touch everyone. Your time is valuable.

By having goals and action plans to fulfill them, you can engage in focused activities, and avoid the random acts of lunch. You'll realize how precious time is and that any activity that doesn't advance your goals hinders you from accomplishing them. That doesn't mean you don't meet friends for lunch or happy hour. But when it comes to marketing, dipping your toe into events or activities that aren't part of your bigger plan are a waste of time.



## Weekly Business Development Activities

Business development is not a start-stop exercise. It's about sustainability. It's a lifestyle. It's something that need to be a habit, something that's thought about all the time.

Don't let a week go by (unless you're on vacation or in trial) where you're not doing something to advance your marketing plan. You should develop a routine of weekly business activities.

Perhaps Tuesday mornings you meet contacts for coffee (Mondays are a terrible day to schedule morning coffees or afternoon lunches). Perhaps every other Thursday you take a contact to lunch. The third Friday of the month may be your monthly networking event.

If you write, set aside every other Saturday morning to do so. If you speak, use those Saturday mornings to work on your presentations.

Just make sure that you get into the routine of setting aside time each week to advance your marketing goals.



## Network from Your Office

Nothing replaces face time. Nothing. However, thanks to the plethora of technologies and tools available today, not all networking has to take place face to face.

Things you can do from your office, early in the morning, before the business day starts, includes:

- Writing handwritten notes
- Sending personalized e-mails
- Leaving voicemails for contacts
- Connecting on LinkedIn
- Sending an e-mail or LinkedIn message asking to meet for coffee or lunch
- Commenting on Facebook
- Tweeting
- Introducing two contacts to one another via e-mail
- Responding to e-mails from contacts
- Planning travel for upcoming network events

There is a lot you can do from your office to keep in touch with others. Come early to the office and set aside a little time each morning to do so.



## Maximize the Drive Home

If you're like most of us, you spend too much time in the car. Instead of listening to music, news or sports radio, listen to podcasts on marketing, leadership and business. Tony Robbins, for example, has a podcast, where he speaks on various topics, including branding, business relationships and leadership. Download business books on your phone and play them in your car. Use the drive home to call contacts and catch up with old friends and colleagues.

That drive home also gives you an opportunity to become conversant on what's going on in the world. Take the time to listen to talk radio and learn about the news of the day. It's also an ideal time to return phone calls. Turn what might be otherwise considered dead time into productive time.

Make the best use of your down time in the car to reflect on how you can advance your marketing goals. Brainstorm an idea for an article and dictate the article into your phone. Dictate a list of contacts you plan on reaching out to the following week. Give some thought about your involvement in your organizations and what you can do in the coming weeks or months.

It's alone time, in a car, without the constant interruptions from your office. Make the most of it.



## Marketing Hour

If you want to make strides in marketing, come into the office one hour early each day. You'll be one of the first ones there, you'll be alone and you'll be able to focus on your networking efforts uninterrupted. The e-mails won't be streaming in yet and the phone won't be ringing.

Getting a jump on the day, getting in early, and doing something to advance your marketing goals – sending e-mails or handwritten notes, working on an article or presentation – gives you a sense of control of your calendar and of your plan and ensures you're taking the necessary steps to build the relationships that will result in business. Understand, this time is an investment in your future.



## TRACKING YOUR CONTACTS

### Build a Contact List

Organization is a key component to properly managing your contacts. Thankfully there are many tools and apps available to help keep your contacts in order.

Consider creating an Excel spreadsheet of your contacts. It's neat and allows flexibility as to what information is saved. If Excel isn't your strong suit, have a legal assistant help.

On the spreadsheet, be sure to include the contact name, company, phone number, email address and mailing address. Additional information that should be captured includes the contact's birthday, hobbies and names of his or her spouse and children as well as the name of his or her assistant.

The contact list should consist of clients, former clients, referral sources, college and law school friends, law firm alumni, co-defense counsel in various matters, leadership from organizations you belong to and anyone with whom you have worked on a committee, co-written an article or presented on a topic. You want to cast a broad net, but not too broad.

Your contact list should be segmented – A List, B List, and C List. Of course your A List is the folks you really want to cultivate, the ones who you are taking to lunch and meeting with on a regular basis.

This list, with all its details about all your contacts, is priceless. It's something you will regularly add to and expand. It will be the reference tool you'll use to reach out to your contacts quarterly, via a call, e-mail, letter or text. It will be the source for your holiday cards, for your press releases and any mass mailings.

Keeping tabs of your contacts and having their information at your fingertips in an Excel spreadsheet makes reaching out to them much easier.



## Holiday Card List

Before you get wrapped up in holiday cards, consider standing out from the rest and sending your correspondence at a different time of year. The holidays are a time of a lot of mail clutter, and it's easy to get lost in the shuffle. That being said, if you wish to create a holiday card list, consider the following:

Send them out early. Do your best to mail them out the Monday before Thanksgiving. Folks take time with the first few holiday cards they receive. After a week of them, they become junk mail.

Avoid e-cards. Often they get stuck in the recipient's spam filter and many feel impersonal. Yes, we all want to save the planet, but a few cards aren't going to prevent global warming. And let's be honest. You're trying to save a few bucks and it comes across that way.

Consider writing a personal note. Instead of sending a card, consider sending a handwritten personal note on your personal stationary. No one picks up a pen and writes letters any more. When we receive them, we keep them. Somehow, it seems wrong throwing it out. And always personally sign your cards.

Do something memorable. As an insert in your card, consider including a red or green business card with a link to a free e-book you wrote or a free downloadable song you performed or a link to a free webinar you did (with information on how the person can get free CLE credit for it), or a non-law related blog to provide for some holiday reading. Remember it's a holiday card and holidays are a time to give. And what better gift than something that you made (wrote, performed or whatever). It's different, it's fun, and it will get noticed.



## Keep a Journal

As you start getting out more, and attending more functions and getting more involved in organizations, you're going to meet more people. Probably a lot more people. Business cards are good, and making a notation on them after you meet them to remind you about them later is a good habit to get into. But also keep a pocket or purse sized journal with you.

A little notebook where you jot notes about the people you met. What was his wife's name? Jot it down. How many kids did she have and what were their ages? Jot it down.

Remembering personal information others shared goes a long way to growing and deepening your relationships with them. You don't want to be that person who after meeting someone for the fifth time still doesn't remember how many kids he has or the name of his wife.

Conversations about the weather, current events and sports are fine, but real relationships focus on what's really important, and family is really important. Keep a journal to jot down personal information which you can type in later into your contact spreadsheet.



## Keep a Rolodex

Keep an electronic Rolodex. Keep it current. Keep it on your iPhone. But also keep a Rolodex on your desk. They still serve their purpose. You can keep business cards, with your jotted notes, in them.

There's something about keeping your contacts' business cards, the first time you met them, the first note you jotted down about a hobby or the spouse's name. (By the way, get in the habit of dating cards you receive to remember when you met the person).

There's something sacred about business cards. The birth of a relationship. They carry a certain permanence, there in your Rolodex to be pulled out and inspected when you choose. Even if you input all the information into your spreadsheet, hold onto those cards. They provide a reminder of your business relationships.



## Plan to Stay in Touch

Make a point of staying in touch with your contacts. If there is someone on your contact list you don't plan on staying in contact with, remove them from the list.

Your contact list is a list of those people that you want to have an ongoing relationship with, and to do that, you have to reach out to them periodically, say hello, catch up, and renew the friendship.

Create a schedule where you plan on reaching out to your contacts quarterly. If you have too many contacts to make that feasible, contact them twice a year. Many you'll see through various functions. Others will require personalized e-mails or handwritten notes. But go through your list and make the effort to stay in touch. You want to be on their minds when a case lands on their desk that they need to refer out. If you haven't spoken, exchanged e-mails or gotten together for meal or at a conference, they are going to be thinking of someone else to refer the matter to.

So the key to relationships is feeding them and to do so, you have to constantly be reviewing your contact list and reaching out. It's about staying relevant in their lives and remaining in their consciousness so they think of you when the time comes.

Top of mind awareness -- it requires a bit of discipline. It's much easier to maintain a friendship than try to recreate it when it's purely opportunistic.



## E-Mail Blasts – Do They Work?

We all have e-mails lists, which we use to send firm newsletters, press releases, newly published articles, news about yourself or your firm. But does anyone read them? Whenever possible, send out individual, personalized e-mails rather than blast e-mails.

However, there are times, that blast e-mails are the best option, such as firm newsletters. Make sure you always provide value in what you send. All blasts should be timely, relevant and short. Introduce articles with a brief, compelling teaser that summarizes the information.

Exercise judgment as to how often you send. Watch your analytics with a focus on open rates, click-through rates and opt-out rates – these metrics can help you determine how often the blasts should be sent.

Use a consistent email template that looks sharp and professional and includes your name and pertinent contact information.

Also, instead of having one e-mail list, you may want to create several e-mail lists, each for a different audience who would be interested in different items you would send out. Some may want your firm newsletter. Some may want your article. Others may want to know what's happening with a given organization you're involved with.

If you're going to send out e-mail blasts, make sure the recipients want to get your e-mail and make sure you don't overstay your welcome by sending too many.



## GETTING OUT THERE

### Everyone is a Potential Client

To grow your network, broaden your definition of potential clients. It's just not in house counsel you want to pursue. Other outside counsel, accountants, financial planners, insurance agents, HR managers, bank executives and small business owners can all refer you cases.

When you decide what matters you want to handle, brainstorm what professionals can refer you those cases. What organizations do they belong to? Where do they network? What events do they attend?

For example, if you're an employment lawyer, join a HR organization, where HR professionals belong and participate. You can network with them at the organization's functions and present to them at their conferences.

If you handle insurance disputes, join an insurance agent association.

You need to start seeing more and more individuals as potential clients who can refer you a matter, or who can introduce you to someone who can. Plaintiff attorneys are very good at this. Because of their practice, they view literally everyone as potential clients. We don't suggest going that far, but we do recommend seeing the potential of a greater number of contacts being referral sources.

Just because you view everyone as a potential client, doesn't mean you spread your crumbs far and wide. You can see the potential in everyone, but still limit who is added to your target audience. Meaning use the "everyone is a potential client" to broaden your view, but still be mindful as to how you focus your marketing energy.



## **Develop a Broad Network**

To expand your network, develop relationships with contacts locally, statewide and nationwide.

The larger the organization, the more individuals you will come into contact with and the larger the pool of potential referral sources. However, the bigger the organization, the longer it will take to cultivate relationships and climb the organization's ladder.

Local organizations expose you to local small businesses, professionals and lawyers who refer matters outside their area of expertise. Statewide organizations may result in referrals from other parts of the state. National organizations may lead to referrals from firms and companies from around the country who are involved in litigation in your background.

Have a strategy to build your network both locally and nationally and focus on organizational involvement within those areas. As always, be strategic with your choices, remembering that, while the tendency is to want to join everything, there is simply not enough time in the day.



## Don't Sell

You can't sell your legal services. You can't go on and on about yourself and your firm, and repeatedly ask for another's business. You want business? Talk to others on their terms and about their interests. Sure, say what you do and describe your practice area. Let others know you can handle their matters. But then move on. It's a brief part of the conversation.

There's even a name for it – your elevator speech – short enough to share with someone in an elevator (more on that later) - just a few sentences – and then you shift to the news, sports or the other's family or hobbies. They know what you do and how you can serve their interests, and it's now up to them to decide whether they'll hire you. That will be driven by the relationship you develop with them.

Selling isn't building a relationship. It actually creates a wedge in the relationship. Selling is antithetical to getting referrals, because referrals are based on trust, and there's something insincere about selling. Talk about yourself, in moderation, but don't sell.



## Likeability

Clients hire lawyers they know like and trust. Repeating it again. They hire lawyers not law firms. Be known is the first step. How do you become liked? Be sincere. Asking questions. Listen. Kindness courtesy. People want to like you.

None of us like self-centered, egotistical, obnoxious jerks. We don't like others who monopolize a conversation, who belittle their staff, who cut us off or who pay little attention to what's important to us. Don't be that guy. Don't be the person who blames his staff, belittles his associates or complains about his spouse or kids. Don't be unlikeable, which is repellant to contacts. You don't like others who are dismissive, who are aloof or who are argumentative.

Sometimes lawyers have a hard time turning off their adversarial side, their confrontational side. But if you want real, sustainable relationships, then you need to be on your best behavior, and treat others the way you would want them to treat you. Be nice, pleasant and warm. And if you're not, if that's not you, then learn how. For your own sake, learn how. It's not healthy floating through life as a jerk. People seek out friendly, outgoing, pleasant individuals. How do you become liked? Be sincere. Ask questions. Exude kindness and courtesy.



## Trust

Clients hire lawyers they know, like and trust. So how do you encourage trust? Simply, do what you say you will do. Keep your commitments. Go above and beyond to make sure your word is your bond.

People often disappoint by making promises and not following through. If you want to be someone who is trusted, under promise and over deliver. At the very least – deliver!

People inherently don't trust lawyers. Distinguish yourself from other lawyers by being that person who others can count on.



## ***Know Your Elevator Speech***

When someone asks what you do for a living, have a plan. If you don't have one, craft a 10-20 second elevator speech. Make it clear, concise and compelling. If you can't tell others who you are and what you do in 10-20 seconds, you'll lose them. It's your personal infomercial, a sound bite that tells others why they should hire you. It has to focus on why you're unique and it has to be memorable.

Your speech should let people know that you are more than a lawyer. It should be crafted in a manner that is less about being a lawyer and more about how you help others. "I help people..."

The speech shouldn't sound contrived. It should be simple, authentic and you.

Brainstorm your elevator speech. Share it with others in your firm. Listen to their thoughts and critiques. Shape it and reshape it until it sounds natural and perfectly represents who you are and the message you wish to convey. Practice and rehearse it until it flows smoothly and fits seamlessly into any conversation. That's an effective elevator speech.



## Get Involved in Organizations

To get referrals from other attorneys, in-house corporate counsel, businesses, or insurance adjusters, you need to get to know the people in charge. People give cases to people they know, like and trust. Gain access to these decision makers and build relationships that will last by joining the organizations in which they belong.

Rather than joining just any organization with the hope that you will get business out of it, search for organizations you want to support. Do your due diligence. Ask yourself what you care about, find organizations aligned with your interests with the prospective clients you want to meet, then attend a couple of meetings. By attending a meeting or two, you can see what the organization does, what the personalities are like, what the commitments are, and what the expectations are before you decide if this is something you want to do.

Joining the organization is just the start. Get involved and volunteer to do the group's "dirty work." For example, if the association's newsletter has stalled because no one wants to be its editor, or there is a fundraiser but nobody wants to head it up, be the one who volunteers to do it. Do the necessary jobs that others avoid and see how quickly your "stock" goes up in the association.

By doing the hard work, you will distinguish yourself in the organization as the go-to person that others will take notice of and with whom others will want a relationship.



## Working a Room

Before you attend a function, have a plan on how to make the most of it. Secure the attendee list and peruse it for folks you know. Reach out to them before hand, let them know you'll see them at the function and ask if they can introduce you to others. Also determine those on the list who you want to meet.

If you can't find out who'll be there, you can still have a plan of engagement. Speak with the organizers and see if they wouldn't mind introducing you to some attendees.

Always arrive early (and plan to stay late). Positioning yourself by the front door allows you perfect access to meet and greet people. Also use the early arrival as a time to introduce yourself and speak with leadership.

When standing in line for a drink or food, make small talk with those in front and behind you. Introduce yourself to individual or small groups. Smile, look into others' eyes, use open body language (no crossed arms, no looking down). If you're meeting someone for the first time, talk a little about yourself, let the other person talk a lot about themselves, decide whether to ask for the other's business card, offer yours, end the conversation on a positive note, and move on.

If you have the opportunity, make connections between the person you're speaking to and your contacts. Keep the conversations moving, open-ended, light. Move around the room, introduce yourself to different individual and groups, and get the lay of the land.

As you're making connections and evaluate which connections are worth pursuing with a subsequent coffee or lunch. It takes some time becoming comfortable talking to complete strangers about yourself. The more you do, the better you will become at it.



## Practice Icebreakers

For some networking comes very easy, very naturally. For others not so much. It's a very awkward situation for a lot of people.

If you want to get out there, you need to learn how to start and maintain relationships. Let's say you're attending your first networking function for an organization. You're new to it, you're doing your due diligence, trying to determine whether it's a good fit for you. But you don't know anyone in the room. Not a soul. So what do you do? Find others who are by themselves, or in a small group, and introduce yourself, let them know this is your first meeting and ask any of the following questions:

Tell me a little about the organization  
What's your involvement with the organization?  
How do you suggest getting involved?  
What's your connection to this event?  
What do you do?  
What do you like about what you do?  
What are you currently working on?

Ask open-ended questions that help build a business relationship. Questions focused on the other person, their jobs, interests and goals. Your questions shouldn't be piercing or direct. They should be easy to answer and allow the other person to decide what to share and what not to share.

Get in the habit of asking open-ended questions about the event you're attending and about what the people you're talking about do. It's small talk. Some are natural at it. If you're not, practice. The more functions you attend, the easier it will become.

Also, when part of a large group of people, encourage everyone to be engaged. Don't leave others sitting in the dark. Include everyone. And, make sure the conversation doesn't go off on a tangent that excludes people – bring the subject back to something that everyone knows something about.

Keep in mind, everyone is there to network. Most are just as eager to meet you as you are them. Be confident. Ask open-ended questions. Take notes on the back of business cards. And, always follow up.



## Be Part of the Conversation

You want to be relevant. To do so, you want to be part of the conversation. To do that, you need to know what the conversation is, what the points of view are, the pros and cons, and have an opinion. Not belligerent, all-knowing or closed-minded - just an opinion. What's happening with the outsourcing of legal work? The newest technology? The recent Supreme Court opinions?

Follow the news, legal trends, advances in technology, issues relevant to law firms and your clients - so that you can have a meaningful conversation, in person or online. You can write about legal trends and relevant legal issues, speak about them, blog and comment about them online. Follow what others are talking about and talk about it. Know the ins and outs and have an opinion about it.

Join conversations on blogs, Facebook and Twitter. Being part of the conversation brings you closer to your contacts by engaging in topics important to them.



## Business Cards

When handing out business cards at a networking event, offer to write your cell number or other contact information on the back of the card to show that you're available to that person whenever and however he chooses. Don't give your business card to someone expecting them to call you. Ask for theirs as well so you can follow up. When receiving cards, jot something on the card to remind you who the person is behind the card. Perhaps an area of practice, community involvement or a hobby. That way the card will mean something to you when you look at it later.

After the event, send an e-mail or hand written note to follow-up and possibly suggest getting together for coffee, breakfast or lunch and suggest a connection on LinkedIn or Facebook.

Import the information about the new contact into your computer, including not only the information on the card but any information you remember about the person from your meeting with her.

Again, keep in mind that three months from now that card probably won't mean anything to you and you'll need something to remind you about who the person is, where you met them, how you were introduced, what you have in common and so forth. Remembering these details will facilitate developing relationships that may blossom into mutually beneficial business relationships.



## **Don't Bad Mouth Your Competitors**

When talking about yourself, don't talk about the competition – how you're better than them, how they're not experts in their field, how you wouldn't hire them, how they were in the paper for losing a big case.

You can't build yourself up by tearing others down. Not only is it wrong, it simply isn't effective. If you do tell war stories, don't tell names. Just scenarios.

How would you feel if someone you wanted to hire bad mouthed the competition? Would that increase the likelihood of you hiring them or not? Focus on you and your strengths and let the rest take care of itself.



## Never Eat Alone

In his book, “Never Eat Alone”, Keith Ferrazzi, says as the title says, never eat alone. In business, invisibility can be worse than failure, and he encourages his readers to get out of their offices and meet others for lunch.

Lunch time is prime time because everyone has to eat. Get out of your office at lunch. It’s easy to eat your lunch at your desk and avoid the time and effort to schedule lunch, take a break from your routine and break bread with a contact. But without this face to face time with your contacts, you’re not going to deepen your relationships with them. Ferrazzi says you want to build a face to face relationship with others when you don’t need them, so when you do, you’re only contact with them isn’t when you ask them for something.

Real relationships are based on regular contacts, where the business relationship – the referral of matters – makes up a small portion of that relationship. If regular lunches don’t fit your budget, do regular coffees. For \$10 you can develop a closer relationship with a contact. Be strategic with whom you have coffee or lunch with. It’s someone with whom you want to build a closer and long term relationship. It’s someone who fits into your overall marketing plan. It’s not simply a random act of lunch.



## Helping Others

You have to give to get. If you want to make a positive impression on a contact and build a closer connection, help them. Put them in touch with another contact to provide them a service they need. Answer a question they have. Listen to them and their problems. If you have valid and helpful advice, share it with them. If you can't help them, refer them to someone who can. Maybe a contact's child needs a referral letter to your alma mater. Perhaps a contact wants you to introduce them to several contacts you have on LinkedIn.

Whenever you're in a business relationship, you cannot simply think of how the other person can help you. You must always have at the forefront of your mind how you can help them.

When you meet someone, ask them what they're working on, what they're involved with, and what they need help with. You may be able to lend them a hand. If you can, and you do, your contact will naturally want, when the opportunity arises, to help you. Next time they have a case to refer, they're more likely to consider referring the matter to you.



## Be a Leader

Every organization craves leadership. Whenever you join one, you should ask yourself, can I become a leader in this organization? In fact, ask yourself, "Do I want to be president of it someday?" Don't join unless the answer is, "Yes."

Leadership roles provide you more exposure and naturally results in more contacts and relationships. Simply being a leader will bring you into contact with more people and more people will hear about you, will want to get to know you and will want a relationship with you.

If you want to be a leader, and build the number and quality of your relationships, do the following:

- Recognize others' talents.
- Recognize what talents your team needs.
- Recruit those who have the talents your team needs.
- Encourage and foster those talents.
- Don't be intimidated or threatened by others or the talents they possess.
- Show them how their talents can serve the team.
- Lead by example by serving the team.
- Place the needs of the team above your own. Others will do the same.
- Sacrifice for those whose talents you have developed.
- Turn them into leaders and have them repeat what you did with others.



## Join a Board

To meet business leaders who are in a position to refer you matters, consider joining a board. Actually, join two – one for the heart, like a charity, and one for the head or career, like a trade association.

But don't join a board simply for referrals. Your time is valuable. Joining a board is serious – it's a big time commitment and generally involves a lot of fundraising, so you're going to be asking others for money, a lot of it.

So if you go this route find an organization that satisfies your interests and passions, that is a good fit for your skill set, and is run in an ethical and professional matter. Joining a board is great for meeting business leaders, and it's a good resume builder for prospective clients looking at your firm profile, but it's a lot of work, so go into it with your eyes open.



## Trade Associations

Insurance adjusters, financial planners, accountants, doctors and most trade groups have trade associations. If your practice area involves representing individuals in a given trade, such as doctors in partnership agreements and disputes, find out if that group has a trade association and if you can join it.

There is no better association to get involved with than an organization comprising predominantly those whom you want to represent. If you do insurance defense, join organizations where insurance adjusters who refer the matters you handle belong to and participate in. Also, consider business associations. Most every city has a Chamber of Commerce, with innumerable committees you can join, participate in and set the groundwork for a position of leadership. There are Chambers of Commerce for different geographic areas, for different ethnic groups and for different professions. Look at the different groups, attend their meetings and see if any is the right fit for you.

If you find the right associations, it won't be too long before you are recognized as a can-do person who knows and understands the concerns and issues facing the industry. Along the way, you will have developed relationships with people in a position to hire or refer you. It doesn't get much better than that. But it takes time, commitment and perseverance. Get out there. Get active. Start today.



## Specialized Bar Associations

Consider bar associations that cater to your prospective clients. Don't just look at your state or local bar association. Consider specialized bar associations, like national bar associations – the ABA, DRI, FDCC, IADC, ADTA – or minority bar association – the National Bar Association, Hispanic National Bar Association, the Cuban American Bar Association – or trial bar associations – ABOTA. Some of these organizations are by invitation only. Ask about their membership. Find out who belongs to the organization and who is active. Are these members in a position to refer you matters you handle? What interaction would you have with them if you got involved with the organization? What involvement can you have with the organization?

If a specific bar isn't available, consider starting one. You will not only be creating a much-needed association; you will also set yourself up as an automatic leader.

Go beyond the typical bar association and search out ones with the referral sources you want.



## Join a Listserv

A listserv is an internet based discussion group, where discussions are had through e-mail. It's a forum for individuals who are interested in the same topic discuss it. For example, the DRI has an active employment law listserv, where DRI members can discuss employment law issues and trends. It offers a forum to share advice, discuss legal issues and refer cases.

By being active on the listserv, others get to know you and your expertise. You know when others need a lawyer, and you can offer your help when appropriate. They can also be forums where your legal questions are answered.

But remember, the more active the listserv, the more e-mails you'll receive and the greater the likelihood that disagreements may break out on the listserv. Also, there are likely some regulars who may dominate the discussions.

Listservs provide another opportunity to be part of the discussion and be privy to the latest legal issues and trends.



## Get Published

Most law firm marketing experts agree that bylined articles are an extraordinarily effective way to establish your reputation as an expert in a particular area of law. For best results, your article should appear in a well-respected publication read by people who have the decision-making ability to hire or refer you. If you want others to see you as an expert in a given practice area, consider getting published. Published articles indicate to others that what you have to say is important enough and authoritative enough to be in print. Writing an article is only half the work. To get your article published and read by hundreds of others, be proactive and strategic and consider the following:

**Brainstorm.** Determine what you want to write about by brainstorming different ideas worthy of being transformed into articles. Your source of inspiration may be a landmark United States or state Supreme Court decision that can serve as the basis of an article. Alternatively, you may want to write about a recent legal trend or craft a “how to” piece such as “how to take a deposition” or “how to retain an expert.” Or you may want to explore an issue a client has asked you to look into. If you are going to be a writer, always be on the lookout for ideas, and ask yourself, “Would this make a good article?” Once you start thinking like a writer, you will never be short of ideas to turn into publishable pieces.

**Compile List of Potential Publishers and Read Their Articles.** Before you sit down to write, decide where you want to get your article published. Compile a list of publishers and publications, including trade journals, newspapers, magazines, and newsletters that might be interested in your idea. Most bar and trade associations have their own magazines and newsletters, and their editors are always looking for articles to fill the pages of those publications. If you cannot think of any publishers or publications to write for, look at the web pages of these associations to see what publications are out there.

Do not pitch a story to a publisher without first knowing what types of articles appear in the publisher’s pages. If you are going to write something a magazine publisher will be interested in printing, you first need to know what the publisher might want, which you discover by reading the magazine. In fact, never write an article without having an agreement in place that ensures your article will see the light of day.

**Start Small.** If you want to eventually see your article in a national magazine or trade journal, start small and work your way up. Generally, the bigger the publisher, the more likely it is that it does not work with novice writers. Those big publications are looking for authors who have written articles elsewhere and have a proven track record. Generally, the smaller publications are open to working with new writers. Start small, get some experience, and “climb the ladder” to the bigger magazines and trade journals.

Once you’re published, reserve the rights to distribute the article, and distribute it those on your contact list who would be interested in it. It will serve to solidify your position as an expert.



## Repurpose Your Copy

When you write an article, reserve your right to republish it and determine how you can repurpose it for other publications. Sometimes you can simply republish it word for word in another publication with a different readership. Sometimes, you can take the meat of it and spin several articles from it to different audiences with slightly different interests and needs.

It takes a lot of work to brainstorm, research, write, edit and polish an article. Find as many venues as you can to get it published. A national publication with a national perspective, a statewide publication with a state wide perspective, a trade journal with a trade perspective, a firm newsletter, a blog, a Facebook post, a link on Twitter. Get it out there to as many interested readers as you can.



## Write a Column

If writing an article adds to your image as an expert, then a column does that tenfold.

Find a bar association or trade association publication, sit down with the editor and discuss writing a regular column on a topic that highlights your expertise and that interests their readers. Think about your ideal prospective clients picking up their monthly magazine or newsletter and seeing you on the table of contents, month in and month out, writing on issues that matter to them, month in and month out.

Yes, it's a big time commitment – don't take it lightly. You have to constantly think of fresh and relevant content and write about it. No matter whether you're in trial, on vacation or just want to take a month off, you're on deadline and you have to be prepared with copy on a regular basis. But if you're up to the challenge, nothing says expert like a regular column in a magazine, journal or newsletter.



## Write a Book

Nothing makes you look like an expert quite like authoring a book. Legal and business publications are constantly looking for copy, especially free copy, to fill their pages. Find an area of the law that you specialize in (or want to specialize in) and start writing articles on the topic. Write enough on a given topic and eventually you'll have enough for a book (this is another reason to reserve the rights to what you write).

The ABA, your state bar or a business publishing house may be interested in your book. And of course, you can always self publish. With publishing software, you can give your book a professional look and distribute it as an e-book by e-mail to your contacts.

By having published a book in an area of the law, you will be perceived by many as an expert in an area, facilitating referrals. So start with an article on a topic, write as much as you can on the topic, accumulate your writings, turn them into a book and be perceived as an expert. It's not a daunting task if you just look at it as one article at a time.



## Give It Away

The internet has become the place where folks go in search for free stuff. We used to pay for newspapers. Now we get news free on Google news and MSNBC online. We used to pay subscription fees for forums like AOL. Today, it would be heresy to charge for Facebook or Twitter.

Even when we pay subscriptions for unlimited movies, we complain about the monthly fee. We can watch music videos on Youtube and communicate by e-mail, all for free. As consumers, we have grown accustomed to getting more and more services for free.

When marketing your practice, you have to keep in mind that the average consumer has become acclimated to expect more for less. And so when dealing with potential clients understand that they are more than ever, looking for value, because they've received so much in their social pursuits for so little. Keep those expectations in mind, and possibly use them to your advantage by offering free information online through your website or blog and possibly free downloadable e-books, apps, or webinars. Think of it as giving to get. Things have a way of coming back to you.



## Pursue Speaking Opportunities

Speaking opportunities solidify your expertise, increase your exposure and build your brand. Seek out opportunities with organizations, preferably ones with which you're involved, to speak to their members who may become referral sources. As always, be strategic. Be very proactive and focused with the engagement you accept. Often the biggest challenge is to learn how to say, "No." If it misses the mark or is a distraction, politely decline.

Once you've identified an opportunity to speak to those who are in a position to refer you cases, be clear about your purpose. Is your primary purpose to build relationships with those you know, build your expertise, or increase your visibility with a certain group?

Learn from the organizers of the event who their members are, their interests, what issues are relevant to them, and what questions they want the presentation to answer. Perhaps send a questionnaire to see what specific questions the prospective audience wants addressed. Call the person in charge of the conference or meeting your speaking at, thank them for the opportunity to speak, and ask them out to lunch. Secure a list of attendees and make a note of several people you want to meet right before and after your presentation. Prepare handout materials and a power point presentation.

During the presentation, arrive early and stay late to network and talk about your presentation. Put out a bowl for business cards and auction off a modestly priced gift, preferably something related to your talk, like a book. (You can send a personalized thank you email for attending to those individuals). Keep the presentation lively and memorable, answer the attendee questions and refer them to articles, a free webinar, or an e-book you've written, and let them know you'll be happy to send it to them, as well as your power point presentation, if they contact you.

After the presentation, follow up! Write thank you letters to the organizers of the event and letters to anyone you had a conversation with (more than just a hello). Ask the organizers how the presentation was received and any criticism, positive or negative, they received about your presentation. For those you had a serious conversation with and you believe would want to learn more, give them a call. We're talking about 2-4 attendees, not everyone. Consider repurposing the presentation to other groups, add it to your firm profile and possibly send out a press release about it, inviting others to ask for the materials. By doing this, you're maximizing the impact of the presentation.



## Conduct Webinars

To reach a larger swath of contacts, from different regions around the country, participate in or conduct your own webinar. More and more, prospective clients are receiving their CLE or continuing adjuster education at their offices in front of their computers. It's cheaper, there's less disruption to their schedules, and they can multi task.

Many organizations are supplementing their programming, and their income, with webinars, and making additional money by rebroadcasting them. Just as with live presentations, seek out opportunities to speak at webinars, or consider hosting your own and invite your relevant contacts. You can pay a third party provider to put on the webinar for you or you can do it yourself through platforms such as GoToWebinar.

The advantage of doing your own webinars is that you can offer it for free. Contacts love free CLE. By offering free CLE, you've reduced their overhead and they'll appreciate you for that. Webinars have become popular, and they're an inexpensive way to share information with contacts.

Your webinars should be relevant, timely and brief. And they should speak directly to your target audience with a focus on what they want to hear. Really tune into your audience and find out their interests prior to determining a topic for your webinar.

Remember, to include in the webinar your contact information and tease up publications you've written and the power point you presented that you're willing to provide if the attendees contact you. And like presentations, the information can be repurposed for future webinars for different audiences.



## **Provide Client Oriented CLE**

More firms are conducting CLE either at their firms or at their clients' offices for their in-house clients. They contact their clients, ask them what their CLE needs are, and tailor programming to meet those needs.

Reach out to clients and prospective clients and gauge their interest in CLE. Find out what CLE they're looking for and whether they're willing to get it at your office or prefer to receive it at theirs.

If you represent insurers, you can offer CLE to all their adjusters in a branch office, or sponsor a breakfast and CLE at yours. Legal departments and insurers are always interested in lowering their overhead, and if you can provide them free CLE for their in house department or their adjusters on current, relevant topics interesting to them, then they will likely take you up on your offer. It will be value added to your relationship with them and help solidify that relationship with more face time.



## Maximize Attendance at Conferences

Conferences are expensive – hotel, airfare, Uber, meals – and time consuming – two or days out of the office. But they have the most potential for deepening relationships with contacts and creating new contacts. You're with others who share your interest on the topics being presented and who likely have legal needs related to those topics.

To make the most of a conference, study the brochure. Do you recognize anyone putting on the program or presenting? If so, reach out to them before and make a point to meet with them during the conference. Secure the attendee list. Any clients? Any referral sources you know? Any colleagues? Let them know you're attending too, and set up a time to meet with them for coffee, breakfast, lunch or dinner, or make a point to meet them at one of the presentations or receptions.

Before arriving at the conference, you should have several meetings scheduled with contacts with whom you want to deepen your relationship. Also, agree to meet with one or more contacts at the social events, such as cocktail receptions of planned meals, and agree that you'll introduce each other to your other contacts there.

While you're attending the conference, participate in events and social engagements. And while you're there, introduce yourself to others –to those sitting next to you in the lectures, to those in front and behind waiting for coffee, to those waiting in line for food or drinks. You have a roomful of people over two or three days that you can meet, add to your contacts and establish relationships with.

Spend as much time possible interacting with these people and follow up with them after the conference with a handwritten note. Plan to attend year after year. This is a long-term play.



## Pro Bono

Doing good by doing right. Not only is pro bono the right thing to do, it's good for business. Clients like to see their firms engaging the community, representing those in need, and providing free legal services. It shows you're a community partner just as they are. Some clients actually consider a firm's pro bono and charitable work when referring matters. It builds yours' and your firm's brand and enhances your perception with companies with a Corporate Social Responsibility strategy.

In addition to providing training to young associates, trial experience in an environment where trials are becoming more rarified, and increased exposure in organizations, it can solidify your expertise in an area of the law.

And of course, significant pro bono efforts are generally recognized, the recognition of which can be shared in press releases to contacts.

Lawyers are blessed to be in the profession and it's important that you give back to the community by whatever means you can.



## Start a Breakfast Club

Networking associations, like BNI, where members meet weekly to talk about their business and refer business to one another, are popular, but they're also expensive, and you don't control who the attendees are.

Consider instead starting your own breakfast club, where you decide who gets to attend. Other lawyers in different practice areas. Insurance professionals, accountants, doctors, financial planners. Go through your contact list, including your LinkedIn list (you'll be surprised how many LinkedIn contacts you have), and select those individuals with whom you want to build closer relationships. They are referral sources or potential referral sources you want to meet regularly. Let them know you're starting a professional networking breakfast and you want them to join. If someone is not interested, go down your list.

Once you have 15-25 individuals that are interested, set up a monthly breakfast at a local restaurant. On any given month, half of them will show. Some months some will attend. Other months others will attend. The restaurant, interested in your business, will set aside a few tables for your group and will agree to provide everyone separate checks. You welcome everyone every month, you say a few words before you start breakfast and encourage everyone to talk to everyone else. Depending on the seating, everyone will be in ear shot of everyone, and everyone can deliver their elevator speech, talk to each other about their practice and possibly some referrals will follow.

You've created your own BNI without the membership cost, and you're are meeting every month with at least 8-10 contacts with whom you want to build closer relationships (as opposed to meeting each of them separately each month).



## Throw a Party

Consider having a reception at your office where you invite contacts to see your office and network with one another. You provide alcohol and food (catered or purchased from a local restaurant or supermarket) and hire someone to serve. Take the opportunity to say a few words about your firm, mingle and don't over serve. It will give potential referral sources an inside look at your office and an opportunity to answer any questions about your practice areas.

Make your parties memorable, make them different. Remember small and intimate beats big and loud every time. Perhaps throw a dinner party for close contacts.

And during the holidays, consider a holiday party either at your office, a restaurant or at one of the partners' homes. There are opportunities throughout the year to sponsor events to bring together your closest contacts.



## Business Reporters

Do you ever notice it's the same lawyers quoted by the same reporters in the legal and business publications you read? That's because reporters have a set of go-to attorneys they call when they need insight or a quote for a piece they're writing. Those relationships didn't happen by accident. Often, those lawyers spent time cultivating relationships with those reporters.

Look through the local publications that you would like to see yourself quoted in, see which reporters write on local legal and business issues, give them a call and ask them to lunch. Explain to them what you do and your practice areas and tell them that you will make yourself available 24/7 if they ever have a question in those practice areas and will provide them background for their reporting and of course a quote if needed. Send them periodic reminders of your availability and expertise to stay on their radar. Once a reporter calls you up and you provide valuable information and insight, odds are they'll call you again on future stories.

For reporters outside your region, network with them on Facebook or Twitter, complimenting them on stories you liked and e-mailing them about you and your practice.

Many lawyers are afraid to talk to reporters. Lawyers like to be in control, and talking to reporters puts their control at risk.

Don't be afraid of reporters, rather help them. Befriend reporters. Yes, you have to take a leap of faith when speaking with them. And, there's no such thing as off the record – be mindful about what you share. If you are available and conversant, you will develop a relationship with those who can get you in the paper on a regular basis.

Taking these steps creates the relationships with reporters that you would have to otherwise pay a publicist to secure.



## Volunteer

Pursue volunteer opportunities through the organizations to which you belong. Ask clients and referral sources what charities they sponsor and what events they are volunteering at, and agree to volunteer at those events.

Perhaps you can get others from your firm, or other contacts who sponsor similar charities, to volunteer too. A client may volunteer monthly at the local humane society. Several of your contacts may be pet lovers and may be looking for opportunities to give back. You can serve both your client, who is looking for volunteers, and your contacts, who are looking for an opportunity to volunteer, by putting them in touch with one another.

Clients remember firms who volunteer alongside of them. Referral sources appreciate you rolling up your sleeves and standing beside them on a Saturday morning doing manual labor. These activities are great team builders and help deepen relationships. Your time is valuable, so be thoughtful, deliberate and realistic when selecting the appropriate volunteer activities.

And volunteering, like pro bono, is the right thing to do.



## SOCIAL MEDIA

### Have a Social Media Plan

Social media is part of today's marketing efforts. And it's important that, before you dive in, you have a plan of action that compliments your efforts, doesn't detract from them.

Social media accounts including Facebook, LinkedIn and Twitter are often used as a cross-check when someone is researching you. Anyone interested in hiring you is likely to Google your name, and typically your social media accounts will be within the top results. Those accounts should be used to verify your expertise and prop you up as a thought leader within your field.

Your accounts should include a professional photo and short summary as well as a link to your website or biography. All posts should be short, timely and relevant. Activities on social media, both posts and engagements, should be mindful and strategic.

You need to think through what social media you're going to use, how you're going to use and how often, always looking through the prism of your personal marketing plan. But whatever you do, remember that most clients are active on social media and expect you to be active too. However, it's also important to remember that social media should complement face time and traditional marketing efforts, not replace them.



## Be Part of the Conversation

Often you'll get breaking news first on social media, followed by thoughtful, and sometimes, not so thoughtful, discussions about it. If you want to know what the legal trends and news are, follow and be friends with and be connected with the thought leaders in your area of practice, and participate in the discussions they're having online on topics relevant to your prospective clients.

Just as others want to hear what they have to say, by being part of the conversation, others will want to hear what you want to say too, and you too will become a thought leader. Clients follow those on social media who have something to say and something to add to their issues and concerns. By posting and Tweeting on what's going on in the legal or business community, you become part of the fabric of information your clients seek out in their daily lives and increase the likelihood that they will think of you when they need to refer a matter.



## LinkedIn

Most of us have LinkedIn accounts, but most of us are not particularly active on the site. What you may find helpful is to look through your contacts who live in your city, where you live and work, find attorneys with complimentary practice areas, and ask them to breakfast or lunch. Sometimes it's attorneys you know through voluntary bar associations or cases you've had. Sometimes, it's attorneys you've never met, but their LinkedIn profile suggests to you that you have something in common and may make a good networking connection.

LinkedIn has multiple ways to share your message. One being status updates (short, quick thoughts and shares), the other being article posting (long articles or blog postings). Take advantage of both.

Your experience will likely be positive, meeting new people on a one-to-one setting, getting to know each other and laying the foundation for an ongoing business and personal relationship. LinkedIn serves other purposes, but consider using it to ensure, as the book says, to never eat alone.



## Facebook

Brian Tannebaum, author of “The Practice” (which you should buy for your associates) referred to Facebook as the forum for small talk for lawyers. We have many attorney friends and their personalities came through on their posts. They brag about their kids, they comment on movies they watched, or opine on the elections. When we see them at events we feel like we already know them because we have had small talk online. Those self-revelations go a long way in bringing contacts closer together, building relationships and having the “conversations” that we may only have a few times a year at cocktail receptions and conferences.

As lawyers, we encourage you to reveal yourself a bit on Facebook and avoid the law firm posts about recent victories and just be the person you are. Brian also mentioned he never “Likes” law firm pages, because they’re little more than firm PR, that reveals little about the individuals that form that firm.

Of course, be mindful with your postings and check your privacy settings regularly. Most importantly, remember anything you post online, whether under the veil of privacy or not, can be available for the world to see.

If you’re looking to utilize Facebook, appreciate it for what it is. A place to share a little about yourself, have a conversation (always polite and respectful) and share in your friends adventures, triumphs and grief. It’s only through personal relationships that we build ties that may turn into business. The relationship always comes first though.



## Twitter

You may have recently signed up for Twitter and are wondering “What in the world should I tweet?” Here are some suggestions:

- Blog and share a link to your blog post.
- Share news stories relevant to your practice area and comment on them.
- Share recent cases and opine on their impact.
- Re-tweet another’s tweet with your own thoughts on the subject.
- Share a link to an article you’ve written or a presentation you’ve given.
- Share a book or movie review with your thoughts.
- Share a press release.
- Share motivational quotes.
- Share about your hobby, whether it’s golf, jazz or wine.

If you’re going to start tweeting, make it part of your routine so that you tweet regularly and build a following.



## Blog

Starting your own blog is a great way to create and share new content with prospective clients. And it's a great content resource for your social media accounts. If you're going to blog, consider the following:

Pick a niche topic. Choose a topic that strikes a balance between appealing to the largest possible audience and focusing on a niche area that you are knowledgeable about and that will draw traffic.

Keep the blog name simple. Simple and direct are the best when naming your blog and selecting a web address.

Content. Professional, well-written blog posts will help you build your name as an expert in your niche area.

Include your bio. Create an "About" section to highlight your skills and background and promote your law practice.

Post Regularly. Regular posts will keep your content fresh and draw more readers to your blog. Daily posts are ideal but hard to maintain when you are busy. As a general rule, one to three blog posts a week will keep your blog fresh.

Write posts on the weekend and publish during the week. There is no reason for writing blog posts when you are most busy. You can relax on the weekend and come up with several posts and publish them later.

Break down complex topics into multiple posts. A great way to blog about a complex subject is to write a series of blog posts on the same topic.

Promote your blog via social media. In LinkedIn, update your status every time you post something to your blog. In Twitter, tweet the headline and shortened URL of your latest blog post.



## Online Ethics

As online marketing has become more pervasive, state bar associations are catching up with ethical rules addressing attorney's online presence. Take the time to read your state's and the ABA's rules regarding social media to see what is permissible and what is not. Who can you have an online relationship with? What can you say about your practice? Your expertise? Can others write you recommendations? If so, what can they say? Can you hold yourself out as an expert? If so, what kind? What can you and can't you post? Where do your first amendment and your ethical obligations intersect?

Take the time to study the relevant bar rules before venturing out onto social media. You have to be observant of all the regulations in all the states you are registered to practice. Make sure you are compliant with all of the jurisdictions. Remember, there are rules out there and be aware of them. Govern yourself and use judgment as you post to your social media accounts.



## EXISTING CLIENTS

### The Importance of Existing Clients

Before you get too caught up getting new clients, remember: Your existing clients are gold and you need to treat them like gold.

Your current clients already know you, like you and trust you. They are your number one source for future business and referrals. Your highest ROI in marketing is achieved through targeting existing clients.

As you develop your marketing plan, it's important to always make time for existing clients. They are your bread and butter. Plus, it's just a fact: it takes much more time and energy to secure a new client than to nurture existing clients and make sure they are happy and continue to do business with you.



## Responsive and Accessible

What is the number one thing that makes clients happy? Responsiveness and accessibility. Clients want you when they want you. They want you returning their calls, texts and e-mails within the hour, preferably within 5 minutes.

Lawyers need to understand that they are in a service industry, and clients will hire firms who provide impeccable service. One of the most important aspects is being responsive and accessible. Clients don't care if you're on vacation, or taking depositions over several days or in trial. When you're not immediately available, you need to have a contingency plan. Perhaps you have another attorney assigned to field the initial inquiries and schedule a time the client can speak with you.

You need to have a flexible schedule to respond to client's questions as soon as possible, and do so with a reasoned and thoughtful response. Perhaps the client's question requires some research. Answer what you can, secure authority to research what you don't have answers to and respond promptly once you secure the answers. You have to weigh promptness of response against thoroughness, and decide what you can respond to immediately and what may take some investigation or research.

Have your phone calls forwarded to your cell after hours, on weekends and when you're out of the office and get in the habit of providing your cell number to clients, inviting them to call anytime. When they need someone they need to know they can reach you right away. Out of the office messages have become an anachronism.



## Deadlines and Commitments

Do what you say you are going to do, period. Your word is your bond and when you agree to meet a client deadline or commitment and you don't, you break your word and fracture your relationship. In cases with frequent deadlines, like federal matters, and with clients who insist on reading everything before it goes out, you have to make sure you're done on your end well before deadlines to provide clients an opportunity to review and respond.

And, if you aren't going to meet your deadline – communicate! Pick up the phone and offer your explanation. Nine out of 10 times, it will be okay. But you have to communicate; don't wait for them to chase after you. If you can't honor your commitment, get in front of it and let people know.

When making a commitment about how you're going to staff a matter, how you're going to report, how you'll meet company and third party litigation and billing guidelines, budgets and case strategy, live up to your commitments. If the client asks you to do something, and you agree, do it.

Your monthly invoices should reflect your commitments and strengthen, not undermine, your relationships with your clients. You need to convey through everything you do that you're a trusted partner who has their best interests at heart.



## Know Business

Be a trusted business advisor. Help your client and impress them by knowing their business. Visit their website. Read their history, their tagline, their mission statement, their pitch to their customers, their related companies, their goals and their growth. Ask them for the materials they provide their clients so you can learn what they pride themselves on and how they promote themselves.

Understand your client's corporate structure, understand how they make decisions, the role of their in house legal departments and the expectations placed on them. What does your client do? How do they deliver their services? What are their challenges? What are the risks facing them? How are they facing those risks? Who are their competitors? What distinguishes them from their competitors?

If you're going to represent clients in business disputes, you need to understand their business. Even if you're going to represent them in product or personal injury matters, you need to know how they conduct their business. It will provide you insight on how better to represent them and how better to serve their needs.



## Know Industry

Go beyond knowing your clients and know their industry. Belong to an industry association they belong to. Read the publications they read. Follow the news about trends in their industry, what they are and where they're going. Follow thought leaders on the industry on LinkedIn, Facebook, Twitter and blogs.

Ask your clients what media and platforms they follow, who they read and what they watch, and where they go to stay on top of the changes in their industry.

The more you know about your client's industry the better you can communicate and partner with them. It also shows your commitment to the client and their needs. And knowing the industry builds your expertise and your brand.



## Think Like a Client

You have to look at your client's cases through their prism. What are their expectations? When they ask a question, what answer are they expecting? If it's a yes or no question, they're not looking for a five page memo concluding in a maybe.

Clients want to pay for 90% right, because every additional 1% that gets to 100% gets very, very expensive. Realize the client only wants to spend so much and be sensitive to the economics of the matter.

When they're evaluating a case for settlement, they want your honest analysis, backed by the facts and the law. They have budgets and they need your help to stay within their budgets. If you calculate their exposure in a case as being "X" and you change it close to trial to "Y" without providing any indication along the way why the valuation has changed, then they're going to have to answer to their superiors. They don't want to do anything that undermines the trust or respect of those over them, and you have to keep in mind who they answer to when dealing with them.

Also, clients treat litigation as an expense center. Generally, unless they're Plaintiffs in a commercial matter, companies lose money when they litigate. They have to pay you, experts, court reporters, and the other side. You're costing them money.

Every time you call them, or worse, have two attorneys call them, or prepare a memo or do research, you're costing them money. So being cost conscious and efficient, while maintaining high quality of work, is adopting the client mindset.

Remember, clients hate surprise bills. Always discuss money up front. Create expectations and over deliver.



## Do Good Work

Clients expect quality work product, delivered on time, without surprises, at a reasonable cost.

Provide the best work – well reasoned, well researched, and analytical. Make sure all communications with the client, whether by phone, e-mail or correspondence, is clear, direct and in plain English. Communicate with them according to their preference – some prefer e-mails, other phone calls, and even some text messages. Define with the client what a “win” looks like – early settlement, prevailing on summary judgment, cutting losses – and execute a plan to win.

Businesses are results oriented. They want attorneys who are the same way. Everything you do should be directed to the end goal to which you and the client agreed.



## Client Surveys

Matter specific, client specific. Short sweet and simple. Don't make it too time consuming. If you are going to ask clients for feedback you have to be prepared to act on what you learn.

In-person client surveys (or audits) are the most effective and powerful marketing program a law firm can implement. The amount of information learned about specific client relationships is amazing and clients genuinely appreciate the opportunity to tell the firm how it is doing and what it could do to improve its services.

If you want candid feedback, you should leave the attorneys who work on the client's matters back at the office when you conduct the survey. But do include a senior partner to convey to the client the importance the firm places on the meeting.

A less effective approach (but still preferable to doing nothing) is preparing a questionnaire which you send your clients to answer. There are survey programs available you can use to conduct online surveys.

Surveys should always be matter specific and client specific, and questions should be short and to the point – don't make the survey too time consuming. Most importantly, if you are going to ask clients for feedback, you have to be prepared to act on what you learn.



## Proactive Communication

Remember out of sight out of mind. It's easier to maintain a relationship than try to bring it back. Find ways to stay on the radar screen and keep in touch.

Proactive communication from you to the client strengthens your relationship with them. Face to face interaction is best. Lunches, sporting events, golf, firm-sponsored seminars and receptions are casual affairs to build a relationship outside the context of your clients' cases.

Active participation in associations in which clients are members is another great way to see clients. Consider a monthly call, at no cost to the client, where you discuss recent legal trends affecting their business. At the firm level, consider an annual event (holiday party, picnic, retreat) to thank clients. Newsletters, law alerts and other direct mail also keep the firm name in front of clients.

The idea is to have regular contacts with your clients outside the context of the work you're doing for them.



## Go Visit

At least once a year, travel to wherever your client's business is, and visit them. The point of your visit is not to sell, but to learn more about their business and show that you are working to help them achieve their goals.

Before the visit, let the client know that you're coming to thank them for their business, to enhance your relationship with them, to meet everyone you work with on their matters, to learn more about their business, to determine ways to improve the relationship and better serve them and to learn of opportunities for new business.

Determine with whom you want to meet and who from your firm should come. Study the client and its industry before the site visit and speak with the attorneys who work on the client's matters for insight into the client. Schedule a day when you will meet your client, take a tour of their offices, meet their personnel, say hello to the individuals, including the staff, with whom you communicate on the client's cases, and take them all out to lunch.

It's your opportunity to thank the client for their trust in you and your firm and it helps solidify the personal relationship you have with them. Talk a little about yourself and the firm, let the client talk about themselves, talk about how you can improve the relationship and how you can better serve them.

After the visit, send a thank you hand written note for the opportunity and implement any changes your client suggested. Also, if you promised to send an article you've written or agreed to invite them to a seminar, do so.

Of course, don't send a bill! Just use the visit as an opportunity to get to know the client and become a more valuable lawyer.



## Go Extra Mile

Always under-promise and over-deliver. When serving a client, go the extra mile. Not only meet deadlines, beat them. Try to come under budget. Bring to the client's attention news relevant to his case or his practice. Always keep them up to speed. If there is another matter they have that you're not handling, but you have helpful research on the subject, send it along.

Find opportunities to add value without billing the client for it, such as sending them articles they would be interested in or offering to do CLEs at their office for free. For example, preparing for a corporate representative deposition is an issue every in house counsel faces.

Present a seminar to the in house counsel and their employees who are often called upon to be corporate representatives. Offer to sit on a board or employee meeting for free and offer your thoughts. You want to show that you're providing value that other firms don't offer.



## Client Gifts

Know your client's gift policy. Can they receive gifts? What value? How often? Who at the company can receive gifts? First rule of gift giving is to know whether you can give gifts.

Choose a holiday you wish to commemorate each year and send a token of your appreciation. The gift doesn't have to be expensive, but should be authentic and sincere.

Also, find out your clients' birthdays and send something then too. Adults often overlook birthdays. A small gift timed to arrive the day of a client's birthday is thoughtful and memorable.

Also, don't overlook outings with clients, like golf, sporting events, concerts or receptions. And mementos like handwritten notes, or a subscription to a magazine or a book you'd thought they may like, all are ways to stay before the client.



## Write What Your Clients Read

If you want to be in front of your client on a regular basis, write for publications they read. Ask your clients what they read. What legal and business newspapers, magazines and journals. What blogs do they subscribe to? What publications do they read online?

Perhaps there is an industry publication they consider the gold standard. Maybe there is a legal publication they read cover to cover. Find out what publications they rely on, reach out to the editors of those publications, and offer to write one or more articles for them. As always, be strategic and make sure your article will see the light of day before you start writing.

Perhaps you can start writing a column, not only getting in front of your client on a monthly basis, but in front of similar prospective clients.



## Communicate with Clients on Their Terms

Learn how your client communicates and emulate it. Are they formal? Informal? Are they detail oriented? Big picture? Are they friendly or standoffish? Do they talk about their families and hobbies, or is it all business? Talk to them on their terms. How often do they want to communicate? What do they want to communicate about? Do they want to know everything that happens in their cases? Who do they want copied on e-mails to them? Who do they want on calls? Do they only want to be contacted when they need to make a decision or approve an expense? What time of day is best to reach them?

If you're in the east coast with west coast clients, or vice versa, you'll need to accommodate your schedule to theirs. When communicating, you need to meet the client where're they're at, not where you are.



## **Your Client's Charities**

If your firm is looking to come alongside a charity and help them with fundraising and events, reach out to your clients to see what charities they partner with and consider partnering with one of them. Perhaps they do volunteer work for them. Do volunteer work alongside of them. Perhaps there are charity receptions or dinners they attend. Consider attending them, but be strategic in your efforts.

By investing in what your clients care about you will show them that you care about them and it will nurture your relationship with them.



## Co-Write an Article with a Client

Everyone wants bylined articles, but who wants to put in the work? Your clients would love to have articles with their names in publication their peers read, but they don't have the time to research and edit them.

Offer to co-write an article with them where you do the leg work. Make sure you receive approval from the publication editor prior to starting the writing process. Have a conference call with the client, choose a topic, pitch it to the publication the client chooses, and do the research and first draft.

Spend some time talking to your client about what they want included, what practical pointers they want to add and the general layout of the piece. Go through a couple of drafts, submit it to the editor, with brief bios and headshots (if requested) and wait to see your name and your client's in print.



## Co-Present with a Client

Ask your client if he wants to present with you at a conference for an organization he belongs to or an organization you do that he would be interested speaking to. As with an article, you do the legwork.

After discussing it with your client, prepare the power point, the paper, talking points and proposed questions you two will be prepared to answer. Spend some time talking through who will tackle which issue and how. Prepare the way you would prepare for any presentation, but take the time to keep your client involved, integrate their ideas and thoughts and do a run through to make sure it will go as smoothly as possible.



## NEW CLIENTS

### Harder to Get Them – 5 to 7 Times

It takes 5 to 7 times more time, effort and energy to generate a new matter from a new client than from an existing one. Studies also tell us it takes 8 to 11 impressions to convert a prospect into a client. It's a courtship. It takes time to build trust and that's what makes new clients so much harder to go after. Needless to say, finding new clients takes time (non-billable), commitment and perseverance.

After you take care of your existing clients, go after new clients with a laser beam. You need to spend more time getting to know them, them getting to know you, and distinguishing your firm from the rest of the pack and from the firms currently serving their needs. It can be done, but you need to be willing to invest in developing a deep, meaningful relationship with them where they grow to know and trust you and consider you the right person for their matters.



## Industry Focus

In the early days of law firm marketing, law firms were marketing their areas of law, but that's not how client's shop. Clients are shopping for industry expertise. Therefore, it's imperative that in your marketing you ditch areas of law and go after specific industries.

First, define the new clients you want to pursue – what industry do they belong to? What organizations represent that industry? Focus on the industry and the organizations that service that industry. Think trade and business associations. By doing so, when you attend a reception or luncheon of the organization, you'll be in a room full of potential clients who need help in your area of law.

Get involved in the organization, chair a committee, help fundraise and promote events, and as you climb the ladder of leadership, you will be developing relationship with prospective clients along the way and establishing yourself as a thought leader in that industry.

You want to fish where the fish are. Find out where they go – the functions and events they attend for their industry – and meet them their on their terms.



## Organizations

Once you define the industries you want to target, look to the trade associations, and really vet these organizations.

When looking for a trade or business organization to join, do your homework. Study their website, speak with their executive director and leadership, attend a function or two. See who belongs to the organization. Who's on the board? Who are the committee leaders? What does their publication look like? Who writes for it and what are its contents? Find out if other law firms are involved, and what leadership roles they have.

You'll probably have competition from other law firms in the organization, but you don't want the organization saturated with lawyers like you seeking the cases you are.

Once you've settled on one or two organizations which are the best fit for you, go deep, really get active and invest time - volunteer, volunteer, volunteer.

Your end goal is to become a leader in the organization (a committee chair for example) and one day, possibly its president. Help organize events, procure speakers, write for the newsletter and speak at events. Go to the monthly breakfasts or luncheons, the periodic cocktail hours and the business meetings. You want to regularly be in front of prospective clients so they come to know and trust you.



## Follow-Up

When you meet a prospective client, you want to turn them into a contact, and over time, build a relationship with them. Leverage through the follow-up. Most people are too busy to follow-up. By making that extra effort, you put yourself ahead of the rest.

After you meet at a function, follow up with an invitation to breakfast or lunch. Ask if you can include them on your e-mail list for your firm newsletter and press releases. If you've written an article they may enjoy or you're speaking at an event that may interest them, let them know, and send them the article or the invitation to the presentation.

You want to turn a random meeting into a relationship. You meet someone. He's in house, he's a vice president of a company, he's a potential referral source – you think this is someone who may one day refer you one or more matters. If you make that assessment, take the time to follow up to create a relationship with the person. If they're not interested, move on. But if they are, create opportunities to meet, speak and e-mail the person and become part of their social fabric so they think of you when they need someone with your expertise.

Remember, the most important part of attending an event or function is the follow-up. Don't even bother going if you don't have a follow-up plan.



## 8 to11 Impressions

Following up is important, because studies tell us that it takes 8 to11 “impressions” to convert a prospect to a client. So after that initial contact, you have to reach out to them in person, by phone, e-mail or on social media 8 to11 times to convert that contact into a client. That’s why it’s important to follow up with new contacts and suggest seeing them in person again – a meal, at a reception, at a conference.

Also keep yourself in front of their eyes on a regular and consistent basis - sending them your firm newsletter, an article you wrote, having them subscribe to your blog, commenting on their Facebook feed – so that you build a relationship with them. Eight to 11 impressions are typically what it takes to establish a relationship with someone and that’s what you’re aiming at.



## REFERRAL SOURCES

### Existing Clients

Existing clients are your number one source for new business. These are the people who will spread the word to friends, family and colleagues.

In marketing, nothing is more golden than a satisfied client. Take your time to ensure all your clients are receiving the attention they desire. Make sure they are happy. They are certain to spread the word about your work and become your top referral source.



## Within Your Firm

Make sure other attorneys at your firm know what you do and your elevator speech, so they can share it with prospective clients. Educate them on what you are looking for in an ideal client. And, get to know what they do and their elevator speech so you can do the same. Go to events together and talk about one another with prospective clients.

No one likes to hear folks talk about themselves. Let someone else do it for you. And taking a partner to functions may make it more comfortable for you both to mingle and get to know others.

Also, make sure your paralegals and staff know what you do and encourage them to seek out opportunities to talk about the firm and its practice areas when the opportunities arise.



## Referring Attorneys

Attorneys who practice in other areas or in other geographic locations can be great referral sources. They can refer you cases they don't handle or simply can't because the case is in your backyard and not theirs.

Rather than going where other lawyers like you go, think about lawyers who don't do what you do. Think about complimentary lawyers in a different practice area – not competing with you.

Develop a network of attorneys across the country that know you, what you do and how you can help their clients when they need help in your city. A good way of doing this is belonging to a national attorney association such as the ABA, DRI, FDCC, IADC or ADTA, finding lawyers whose clients have legal needs you can serve, and developing relationships with them.

Include in your directory of contacts attorneys across the country who can come to see you as meeting their legal needs in your city. Also, make the relationship reciprocal, letting them know they'll be whom you call when you have a need in their city.

Many attorneys' primary referral sources are other attorneys. Foster relationships with them and remain in contact with them throughout the year, through e-mail, handwritten notes or social media.

Keep score and make sure you have mutually beneficial referral relationships with other attorneys. If you are referring cases to them, the act should be reciprocated.



## Other Professionals

Do not think only other attorneys can refer you cases. Accountants, doctors, financial planners, insurance agents, human resources professionals and bankers are all potential referral sources depending on your expertise.

If you represent small businesses in commercial matters, any of these professionals may be a good referral source for you depending on the small businesses you represent and what you want to represent them for. Each of these professionals has one or more trade groups they belong to, where they meet monthly and mingle.

It may prove to be a target rich environment with few other attorneys with your expertise attending their functions. You may become the resident expert in your practice area in the group, speaking and writing on it.



## Law Firm Networks

There are associations of law firms whose purpose is to create a referral network among the law firms. They have membership dues and certain obligations, but they provide you a referral network for your firm to plug into.

You have firms from across the country who may refer you matters and you have a national network of law firms to refer matters to. Some firms have found these networks a good fit for them while others have not. Due your due diligence and ask member firms about the pros and cons. Also consider starting your own network.

Consider a statewide network, where your firm, and other small or medium sized firms partner with other similar sized firms throughout the state, providing statewide coverage for prospective clients. You can create your own organization, with its own website and name, and work together to market it as a statewide association serving all a client's needs within your state.

As always, due your due diligence before you jump into (or start) any networks. Once you determine what's best for you, be ready to jump in and invest your time.



## Super Connectors

Sometimes the best route between two dots is not a straight line. To that end, take time to make relationships with connectors - those individuals who work with your prospective clients.

Think insurance agents, accountants and financial planners - individuals who work with the principals of companies who from time to time need legal help. These individuals know everyone and everyone knows them. Their list of contacts may be in the thousands, and they're constantly putting contacts together, forging business relationships. They're always saying things like "I want to introduce you to X, they'd be a great person for you to meet." They're the types who have wine tastings at their offices or who plan networking events at a restaurant. They know their contacts needs and know how to match someone with a need with someone who can satisfy it.

If you network at all, you'll spot a super connector when you see one. When you do, take the time to build a relationship with them, because they will help you build relationships with prospective clients.

And in the end, maybe it's you who should be the super connector. You are already out there. You have the ability to connect others. Take the reins and position yourself as the super connector.



## Refer Cases

A great way to get cases is to refer them. It's the give to get concept. You, too, are a referral source.

When you refer a case to another lawyer he wants to repay the favor by referring you a case when he has one to refer. That's why you need to have a list of go-to attorneys from across the country so when you have an opportunity to handle a case that you cannot, you suggest the matter be referred to one of these contacts. And whether the prospective client refers the matter to your contact or not, let the contact know you thought of them and recommended them and their firm to handle the matter.

Being active on listservs and organizations provides you an opportunity to regularly offer the names of contacts who can handle matters you cannot. Your contacts will remember your efforts on their behalves.

Be mindful of referral fee regulations in the states where you do business. Some jurisdictions allow referral fees to be collected, others don't, and in others, you have to do some work on the case. Educate yourself. And, remember, in most cases, if a fee is allowed to be collected, it must be disclosed to the client.



## **Do Your Contacts Know What You Do?**

All your contacts should know what you do. They should know what you handle and just as importantly what you don't (to avoid time consuming calls with prospective clients you cannot help). You want to empower them to help you. If you're in regular contact with them, either in person, phone, e-mail or social media, occasionally remind them of your expertise and the cases you handle. Have them remind you what they do and the cases they handle so you can help them if you hear of a case appropriate for them.

And when you tell others what you do, let them know the specific types of cases you handle. This goes back to your elevator speech. "I help people..." Be specific. You are more than just a lawyer. Describe how you help your clients.

When your contacts hear of a case, they need to know whether that case is suitable for you or not, so they know right away whether you would be the right attorney for that matter.



## FIRM MARKETING

### Marketing Culture

So far we've discussed what you as an individual can do to build your practice and reputation. Now we will turn our attention to your firm. It's important that you and your firm work together toward a shared vision, toward shared goals. Doing so is much more likely to have an impact than if you work independently from one another.

You want your firm to foster a culture that encourages marketing. Many of the tips in this book should be shared firm wide, and every attorney should be encouraged to market.

Your firm should develop a firm wide marketing plan, encourage every lawyer to develop their own individual marketing plans, reward both efforts and results of marketing, sponsor regular firm meetings to discuss marketing efforts and how the firm can help individual attorneys with their plans, and empower attorneys with the tools to attract clients and matters to the firm.

Marketing shouldn't be reserved to a few senior rainmakers. It should be embraced firm wide, and everyone should bear their responsibility. In fact, about 40% of midsize law firms are not offering marketing training to young lawyers.

What a junior associate can do is different from what a senior shareholder can, but it doesn't mean the junior associate can't contribute. They can help write articles and prepare power points for presentations. They can join organizations and earn leadership roles in them. They can network and build contact lists. Everyone should do what they can to advance both the firm's and their own marketing goals.



## Training and Development

Firms need to teach their attorneys how to market. How does one get involved in an organization? How does one write an effective article? Give a compelling presentation? Network at a function? Break the ice? Tell others what you do? Develop a system to stay in touch with contacts? Make the “ask?” Close the deal?

The firm rainmakers need to invest in the younger partners and associates and teach them how it's done. Where do they meet prospective clients? How do they stay in front of them? How do they communicate with them? What organizations are worthwhile and which ones aren't? What are the speaking and writing opportunities worth pursuing?

Marketing can be taught and those in your firm who do it well should be encouraged to share their wisdom with those who are learning the skill. The firm should consider monthly luncheons or meetings, where one aspect of market is chosen and the senior rainmakers provide their take on it. This will offer less experienced attorneys a variety of perspectives and helpful tips.



## Industry Practice Groups

Put together attorneys who work in the same field, have the same or similar expertise and who wish to target the same industry, and have them work together as a group to target that industry. Have them pool their time, energies and resources so they strategically target organizations, speaking opportunities, publications and prospective clients. They can help one another reach out to new contacts and build closer relationships with existing ones.

The purpose of the group is to focus their energies on one industry, drill down and establish a broad network of relationships with decision makers in that industry. Having several attorneys, who share expertise, speak the same language and have the same goals, working together toward those common goals, increases the odds of landing new clients and new matters. Collaboration ensures there is one team with one focus on one industry.



## Marketing Plans and Budgets

A firm should have a firm wide marketing plan and budget, into which the individual attorney marketing plans and budgets feed. (In fact, most firms should have an in-house marketing director.)

What are the industries the firm wants to target? What clients does it want to pursue? What organizations does it want its lawyers involved with? What publications does it want to appear in? What should its website look like? What should its social media plan be? What events should its lawyers attend? What reporters should it befriend? What efforts should be made with existing clients? Prospective clients? Referral sources?

An open and honest discussion should be had with the firm's partners, and yes, with the associates, and get everyone's input and buy in. Excluding associates excludes Millennials' expertise on social media and their perspective on what may work and what may not.

The firm can solicit the attorneys' thoughts on these areas via e-mail, and have a team assigned to sort through and gather everyone's thoughts and contributions. Then an agenda can be put together and a day long meeting held, perhaps at a firm retreat, to discuss a firm wide plan. After it's reduced to writing, further discussions can be had in subsequent meetings to refine and finalize it. It will serve as a blueprint on how the firm plans to increase the number of cases referred to it in the months and years ahead.



## Non Billable Time

Firms need to encourage their attorneys to do non-billable marketing work. The firm's billable hour requirement should take this into consideration. It should encourage attorneys to keep track of their non billable time, and attorneys should report to the firm the time and effort they invested each year in marketing.

By elevating the non-billable hour, it will encourage its attorneys to spend more time on non-billable marketing efforts. Non billable time has to stop being a dirty word, something that's relegated to a second class status. It's through non-billable time – marketing – that the firm will get the cases to increase its billable hours.



## Compensation System

In addition to financially rewarding attorneys for the work they bring in, consider having a discretionary bonus, particularly for associates, who go above and beyond in their marketing efforts. If an associate becomes a leader of a bar association, and has become one of the youngest leaders in the history of the organization, the firm should reward that. If they write a book and its marketing brings a lot of attention to the firm, they should be rewarded.

A firm needs to consider rewarding effort, not just results, because enough effort will yield results in the long run. By rewarding those efforts now, it will encourage behavior that will pay future dividends.



## Firm Wide Marketing

There are certain marketing efforts that need to be quarterbacked by the firm. They include:

- Newsletters
- Press Releases
- Website improvements
- Firm social media presence
- Firm sponsored CLE
- Firm receptions, events, parties, picnics

These are things the firm can do to increase its visibility to existing and prospective clients. Newsletter and press releases keep the firm in front of others. Firm events like CLE or receptions bring its attorneys face to face with its clients and contacts.

Just as attorneys individually should reach out to its contacts, the firm as a whole should do the same and thought should be given to ways of doing just that. These activities require attorneys' time and participation and the firm should seek their feedback to make the most of them.



## Press Releases

The firm should have a contact list (comprised of contacts provided by the individual attorneys from their contact lists) and send those on the list regular (but not too regular) press releases via e-mail and social media about the firm and its attorneys.

Not every accomplishment or court victory should be touted, otherwise you would inundate your contacts. But trial victories and significant summary judgments, selection to president of an organization or publication of a book, or an upcoming webinar or firm CLE - are the type of events to publicize. They promote your firm and they keep it on others' radar.

Also, consider to have different press release lists, for different types of press releases, targeting different categories of contacts. Also, individual attorneys may want to send press releases about their individual accomplishments to those on their contact list.



## Cross Selling

Clients hire the lawyer but you are selling the firm. You are selling the team. Your firm should be a collection of specialists, not generalists.

Practice groups and individual attorneys should be encouraged to cross market each other. Firm meetings should be convened and practice groups and attorneys should let the others know what they do and the cases they handle.

The firm should consider an internal firm brochure, where practice groups and attorneys spell out how to market them when meeting with contacts. The successes of practice groups and attorneys need to be circulated among the firm. Attorneys should identify clients they can cross sell and schedule meetings with them to introduce other practice groups. And the firm should incentivize, through compensation, cross selling to promote it. Attorneys need to know their efforts to market others in the firm will be rewarded.



## Partner Feedback

Have your partners share, through e-mails to all the attorneys, what is working with their personal marketing plans, and what is not. They are the ones on the marketing frontline. They should be sharing with each other and the associates what they're doing and how effective it is. Perhaps they have suggestions for others on what they may want to do.

Also, partners should review the associates' personal marketing plans and provide constructive criticism. Perhaps they can suggest organizations the associates may want to join, a topic they could write on, a publication they could write for, or offer other helpful suggestions. Just as senior attorneys teach less experienced attorneys how to litigate, they can teach them how to market.

As a young lawyer, it's important to look at the partners of the firm who have the kind of work you want -- look at those partners as your clients. They are the people who have the work you want. Be unashamed about letting your interests be known. Provide great work and great service to the partners. Then ask for feedback. And, most importantly, act on feedback. Be accessible be responsive, do great work, ask for feedback and act on what you learn. If you aren't prepared to act on what you learn, don't even ask for feedback.



## Firm Newsletter

To keep your contacts informed about recent legal trends, firm victories and attorney accomplishments, consider weekly or monthly newsletters. Sustainability is the key. Churn it out on a regular basis. This is not a start-stop project.

Prepare a firm template and incorporate the look of your website, including the design, logo and color scheme, on the newsletter for consistency and branding.

Make sure each newsletter has a consistent font, font size, layout, graphics, and general appearance. Study other firm's newsletters. What do you like about them? What don't you like? What do you want to emulate? What regular columns do they have? How many authors do they have? How many different newsletters do they have? Are they split up according to practice groups?

Once you settle on a look and content, you need to recruit several attorneys who will commit to writing columns and an attorney to edit their work and layout the content. Write the newsletter in plain English, provide valuable content about legal trends and hot cases, and keep kudos about the firm to a minimum.

Make sure the content is short, timely and relevant. Feature teasers that link back to your website. Create subject lines that capture attention and encourage readers to open the message.

A newsletter is a great way to help achieve your 8 to 11 impressions. It doesn't replace face time, but it sure can enhance it.



## Consistency is the Key

Marketing is not something you start and stop. Effective marketing is consistent. It's something you weave into your lifestyle. You reach out to contacts on a regular basis, you make new contacts and reach out to them on a regular basis, you attend the monthly luncheons and monthly networking cocktails, you write a column, and you speak each year to your association. It's all about consistency.

To be consistent, you need someone to hold you accountable. A firm should have monthly luncheons, either the whole firm, if it's small enough, or by practice group, if it's not, and have the attorneys go around the conference room table and say what marketing they've done since the last firm marketing luncheon. Attorneys knowing they have a roomful of people to answer to each month will put in the time month in and month out to advance their marketing goals. Also, a monthly forum allows attorneys to bounce ideas off one another to improve their marketing efforts.



## Firm Retreats

As law firms become larger, multi-office and even multi-national, firm retreats have become more and more commonplace. Although every firm retreat differs according to the firm's unique culture and its specific issues, the primary purpose usually involves strategic planning, marketing and business development, discussions of specific business issues, and creating vision for the firm's future direction. It's also a time to step outside the day to day insanity of practice law to bond as a firm.

All of these objectives can be met in a properly planned and well executed firm retreat held at the right time and at the right place. The firm is investing lots of time and money to gather its people, so it's important to have very clear goals and objectives for what you want to accomplish during your time together.

Next, you must develop an agenda to support those objectives. This is critical. Who is going to attend? Partners only? Associates? Spouses? Senior staff? If the purpose is to gain buy-in to a new strategic direction for the firm, partners only might be appropriate.

If, however, the primary purpose is more social and relationship building, the firm might include associates and spouses. More and more firms are inviting clients, recruits and alumni to their firm retreats, as well.

To keep a handle on costs, establish a realistic budget in advance. In addition to hotel accommodations, travel, food and beverage, recreation and the like, consider the collective value of the lawyers' time. If budget restrictions are a factor, don't forgo the gathering, rather keep it close to home. Just be sure to go off site. Consider a local country club or other large local venue.

If you plan to engage outside speakers or consultants to participate, consider their fees and expenses, as well. With proper planning, you can have a productive, reasonably priced firm retreat.

And, more importantly, when attending, have fun but be responsible. Remember, people are watching. Mixing lawyers and alcohol sometimes results in regretful situations. Keep your alcohol intake to a minimum and avoid sloppy behavior.



## Distinguish Your Firm

Just as your individual attorneys should become experts in a field, the firm should choose one or more practice areas, and become known for handling matters in those practice areas. Your firm could become one of the go to employment firms, or go to intellectual property firms or go to bet-the-company trial firms.

Develop a reputation in an industry handling their matters, participate in their associations, speak at their meetings, write for their publications and have a firm wide approach to targeting their industry.

Not only do the individual attorneys want to build their brand around a given industry, collectively, attorneys from the same practice group want to build their collective brand for that industry. That's a way firm wide and personal marketing plans need to complement one another, so they target the same industries and have everyone working toward the same goals.

Firms often look pretty vanilla with lawyers being conservative, not wanting to stand out and presenting themselves as all things to all people. However, to distinguish yourself from competitors, you can't be all things to all people. Don't be afraid to get creative and do something different.



## Develop a Mentoring Program

Mentoring has become a popular topic. Firms have mentoring programs, bar associations have them, and there is even electronic or e-mentoring. Mentoring is such a hot topic because it works well, helping new attorneys “cut through red tape” and end self-doubt. Studies show young lawyers want mentoring training development.

Develop a mentoring program where seasoned rainmakers mentor younger partners or associates and teach them one-on-one how to market. Mentoring should focus on the soft skills, such as business development, time management and billing practices – the things they don’t teach you in law school.

To obtain clients, you must meet them and develop relationships with them. To do so, you can go to a trade group or bar meeting and simply walk around, introducing yourself to whomever you see. However, a much better approach is to go with a mentor who knows the organization and the people involved. The mentor can introduce you to contacts and help you get connected with the more powerful people in bar and trade associations.

Mentors can get you involved in committees and assist you in your ascendancy to power. Mentors can clear some of the obstacles facing less experienced lawyers from meeting and developing personal relationships with prospective clients.



## Invest in Technology

Law firms not only need to invest in their lawyers, they need to invest in their technology infrastructure. It is predicted that technology will soon surpass rent as the number two expense after salaries.

Firms need quality computers and laptops, hotspots for travel, apps for remote work and increased productivity and programs that enable them to review countless e-discovery documents.

If you want to represent big clients in big cases, you need to have the technological wherewithal to review, sort and select from countless of documents. That means investment in hardware and software that will facilitate that.

Take the time to look online and see what the trends are for law firm technology. Subscribe to a blog or two on the topic and consider attending a trade show addressing it.

More and more, when hiring outside counsel, companies are asking what technology they have to meet their litigation needs.



## Invest in Your Staff

Your clients' and prospective clients' first contact with your firm is likely through your staff. Your receptionist and your legal assistants will interact with them and provide them the first impression of the firm. Make sure to train them on how to speak to clients, how to address their concerns and answer their questions. What if you're not in the office and it's an emergency? What if the client has an urgent question? What if a client wants to know something about a case or has an inquiry about a firm invoice? What if it's a new client interested in hiring the firm? What information should the staff provide them and what questions and issues are best left to attorneys to handle?

They need to know the common questions they will be asked and how to address them. They need to know how to handle a wide variety of emotions and concerns over the phone or in person and how to get attorneys involved as soon as possible. In short, you need to train your staff on client relations to provide clients the best customer service imaginable.

In many law firms non-lawyer support staff is treated like 2nd class citizens. They aren't invited to meetings and often have separate break rooms and different parking areas. Different break rooms, different parking. Remember they play an integral role in the firm. It's important to listen to them and treat them as part of the team.



## **Create a Managing Partner's Forum**

Consider creating a managing partners' forum consisting of your firm's managing partner and the managing partners of other firms in your local legal community. It will provide a network of local firms who can refer matters to others outside their practice areas. It will also create a forum to discuss issues pressing to your respective firms – associate hiring, training and retention, health and legal malpractice insurance, marketing, technology, partner compensation, community outreach, succession planning and related topics.

The group can meet monthly at a host firm's office, can have a monthly agenda where one of these topics is addressed with an open and honest discuss on the topic to follow. Along the way, the managing partners develop close business relationships as do their firms, creating opportunities to refer matters back and forth.

Creating an open and safe environment to discuss best practices in a wide variety of topics, everything from how much associates should be paid to which associations are the best to meet clients, strengthens your firm by learning what works and what doesn't.



## Alternative Fee Arrangements

Alternative or special fee arrangements are agreements between your firm and a client to provide compensation to your firm based on a structure other than hourly billing. Despite what we have been reading for decades about the sweeping change that will take place, the billable hour remains king. However, some firms still consider moving forward with alternative fee arrangements.

Such structures can take the form of contingency fees, fixed fees, capped fees, blended fees, value or success based fees or other alternatives to hourly fees appropriate under the circumstances of a specific matter.

Special fee arrangements can be hybrids in which your firm receives a percentage of its hourly rate, with the remainder contingent on the outcome of the matter. If there is an unfavorable result, no further fees are paid. If there is a positive outcome, your firm might receive a multiple of the fees it has at risk.

In addition, special fee arrangements can span more than one case. Your firm could, for example, negotiate special fee arrangements that provide a fixed contingency across a group of cases, or handle a group of defense cases at a reduced rate.

If you go online, you can read about a variety of alternative fee arrangements firms are making available to their clients. Study which ones would be suitable for your firm and make them part of your pitch to new clients.



## **PAY IT FORWARD**

### **Be a Marketing Mentor**

Once you learn and apply the marketing skills in this book, take on a less experienced attorney in your firm as a mentee. Take time to share with them your personal marketing plan, and explain to them what worked and what didn't, and what changes and adjustments you made along the way. It's gratifying to help younger lawyers improve their marketing skills.

Offer to attend a marketing function with them to show them how to mingle. Offer to help them with their first article – everything from finding the right publication, to how to communicate with the editor, to picking a topic to editing the final piece. Guide them through the leadership ranks of the organization they're involved with. Help them with their elevator speech and getting over the anxieties of public speaking. Become their accountability partner, taking them out to coffee or lunch once a month, keeping them honest about their efforts and progress in meeting their marketing goals.

Your mentee will grow and become a skilled marketer from this relationship and you too will develop your marketing skills. You'll also be contributing to the overall health of the firm by developing a young rainmaker who will build the future of the firm.



## Assist with Others' Marketing Plans

Once you've drafted a marketing plan and have massaged it over six months, accomplishing tasks toward your goals and adjusting those goals and the tasks to achieve them, you'll start developing a sense of what works and what doesn't. Who should I reach out to? What organizations should I get involved with? What's the leadership track in these organizations? What publications should I write for? When, where and on what should I speak on? Which of my contacts should I reach out to, how should I reach out to them and how often?

You'll start noticing patterns and shortcuts and marketing "tricks" to maximize your time to build relationships with the right people. Once you're at that stage, you're in a position to look at the marketing plans of less experienced attorneys at your firm and critique them. Offer them advice to modify their plans to make the most of their skills and talents and contacts.

Help them avoid dead ends and spinning their wheels, and direct them toward goals and tasks that will maximize their energies and offer them and the firm the biggest payoffs. In short, pay it forward.



## FINAL WORDS

### What Not to Do

Some marketing efforts work. Others don't, such as:

- Cold calls
- Overselling
- Huge unsolicited promotional materials
- Taking existing clients for granted
- Inflating your's or the firm's experience
- Being a pest
- Not returning phone calls
- Random acts of lunch and golf
- Being involved in too many organizations
- Insulting the competition
- One shot efforts like sponsoring an event for an organization you're not involved with
- Brochures and newsletters that aren't short, direct and say something
- Signing up for every attorney directory
- Partners pet projects that don't advance the firm's marketing goals
- Not investing in personal relationships

Before you get carried away and you go off on the wrong tangent, remember marketing is about reputation and relationships. It's face time, it's follow up. It's active involvement in associations. It's proven activities that the country's top rainmakers will tell you – you have to invest the time.



## Leverage Your Hobbies

Find ways to turn your hobbies into marketing opportunities. If you like to golf, invite clients. If you like to cook, have dinners for contacts at your home. If you play music, send recordings as Christmas gifts. If you're an avid reader, buy hard copies of books, read them and then send them to contacts who would like to read them. You might even enter into book exchanges with contacts across the country. Whatever your hobby is, some of your contacts share it. Seek them out and share your hobby with them. People who have similar interests and share those interests build close relationships. Whether it's listening to jazz, writing fiction, reading biographies, going to sporting events or hunting, share those hobbies with contacts and build relationships with them.

Play to your strengths and interests. You are more likely to sustain things you are good at and you enjoy. Develop relationships built on interests outside of the law. Find areas of mutual interest in which you can build friendships.



## **Pursue Your Passion**

Each of us has passions. We have dreams, some of which we have had since childhood, that we want to pursue. Reignite your passions. Pursue them wholeheartedly and find ways to bring others into your passion.

Perhaps it's a charity you volunteer for, a novel you're writing or running marathons. Bring along others for the ride and have them experience your joy and rapture when pursuing your dreams.

Seeing others do what they love builds close relationships, which is the key to all marketing. Sharing your passions will bring out in you a side that's excited, that's alive and that's engaged and your joy will be infectious.

Bring that passion to all your marketing efforts and you will see the dividends. Embrace your passions and put your heart in things as you move forward in your career and your personal business development. Do what you love, love what you do.

