Your Assistant Is Your Secret Marketing Edge

Stacy West Clark | **Are you overlooking one of the greatest tools in your marketing arsenal? You are if you're failing to give your legal assistant or secretary an active role in your business development efforts.**

Secretaries and legal assistants who are organized and responsible—especially ones who are looking for more administrative responsibility—can give lawyers a tremendous amount of help in their marketing activities. Here are ways you can make these valuable members of your legal staff dynamic players on your marketing team.

Collecting Key Marketing Data

Your secretary's or legal assistant's PC can, and should, be the repository of all key marketing information related to your practice. The names and contact information of all your clients, potential clients, referral sources, legal colleagues, law school classmates, association contacts and more should be in the database. If your secretary is in charge of completing new matter/ new client forms, then she or he is in the best position to ask you for the following information when a matter is opened or completed:

- The names and contact information of everyone at a client organization
- How the case came to the firm—that is, what specific marketing activity (for example, Yellow Pages ad, speaking event, Web site) or referral source (for example, accountant, broker, banker, other lawyer) resulted in the case coming to you
- Who at the client organization should receive the firm's newsletters, announcements and event invitations
- Brief information about the matter so that he or she can properly address the client on the phone and

route calls quickly if needed

- Whether a form thank-you letter to a referral source should be prepared

With this information in hand, firm mailings can be targeted and swiftly sent, press releases issued, referral sources tracked—and so much more. Carla Levenson, director of marketing at O'Neill, Lysaght & Sun LLP, in Santa Monica, California, says the test of a lawyer's contacts database is, "If the lawyer is featured on the front page of the *New York Times* tomorrow, would he and his secretary be prepared to quickly send out a mass mailing of the good news?"

Try to keep your secretary aware of your outside professional and community activities so that he or she can ask you after an event has occurred whether someone should be added to the contacts database.

TIP: Make Marketing a Job Responsibility

Prepare a set list of marketing activities that are your assistant's responsibility. Make sure your assistant knows that these duties are part of his or her job. If you are in a larger firm, give a copy to your human resources director so that other lawyers in the firm can use the list when interviewing prospective staff members.

Marketing Activities You Can Assign to Support Staff

- Maintain your master contacts database and mailing lists
- Draft press releases and maintain your media list
- Prepare marketing materials and PowerPoint presentations
- Review the Internet, newspapers and periodicals for mention of you, your firm and your clients
- Calendar regular time for you to conduct market activities
- Prepare mailings to client so you can acknowledge birthdays, promotions, anniversaries and the like
- Arrange and assist with follow-through of client interviews
- Assist at client receptions and seminars
- Provide insight into how your client service can be improved

Scheduling Time for You to Market

In some firms, secretaries or legal assistants are responsible for calendaring time in which the lawyers specifically conduct marketing activities. That can mean, for example, blocking out a regular weekly half-hour time for the lawyer to do some serious marketing tasks.

Andy Havens, director of business development at the Ohio firm Vorys, Sater, Seymour & Pease LLP., advises lawyers at his firm to use the time to do any of the following:

- Check in with three to five clients on how things are going
- Review articles and news items, gathered by their secretaries, concerning clients or prospective clients
- Call targeted reporters with story ideas
- Provide secretaries with new contact information for the contacts database
- Work on a short article or alert to send to clients and potential clients

Maintaining Your Marketing Materials

You can also put a member of your support staff in charge of maintaining your marketing materials. These include your printed biography, Web site bio, head-shot photos, copies of speeches you have given and articles you have written, clippings of your press mentions and a list of major victories and deals you have handled that can be publicized. All these items can be made into PDF files.

At many firms, secretaries and legal assistants are also trained to put together presentation packages for prospective clients, as well as PowerPoint presentations that lawyers can use in their marketing activities.

Helping with Client Interviews

One of the most effective and least expensive marketing tools a lawyer can ever employ is the client interview. And you can make it even more effective by having your secretary or assistant play a key role in setting up these meetings and ensuring that there's follow-through on the clients' comments.

In a nutshell, a client interview is a meeting between a lawyer and a client to go over the concluded matter and elicit the client's opinions on what might have been handled differently. The meeting is also an opportunity to learn what business and legal challenges are on the horizon for the client.

Enlist your secretary's or assistant's support for these interviews. Ask them to schedule the interview when the final bill on a matter is sent, and then to help you address any problem areas the client mentions in the interview. Your staff's involvement can be the linchpin to successfully following through on a client interview and, thereby, generating new business.

Representing the Client Service Team

Secretaries and assistants are a law office's frontline representatives to clients and others. In many ways, these staff members give people a first impression of the kind of personal service the lawyers deliver. Lawyers need to keep their secretaries and legal assistants in the loop.

Take time to explain cases, and the names of important parties, so that members of your legal staff feel like part of the team. Explain how you want people to be greeted on the phone (surnames or first names, and the like). Work together to decide how to route calls when you're out of the office, and what kind of information (such as your home phone) can be provided to which persons on the phone.

Claudia Springer, a partner at the national firm Reed Smith, has made it a point to invite her secretary to client events so her secretary can get to know the clients face to face. Importantly, Springer asks her clients to bring their key staff members as well. At the Michigan firm Dean & Fulkerson (and at many others across the country), secretaries staff reception tables at seminars and other firm events. Client services manager Deborah L. Cona says that when a lawyer's clients check in, the secretaries at her firm "reintroduce themselves to clients and make them feel welcome and comfortable."

It is also a good idea to assign your secretary or assistant the task of scanning the Internet, newspapers and industry journals for any news that might affect a client's business. You can then call your client's attention to the news (and to you) with a personalized note.

Margaret McCaffery, of Canterbury Communications, suggests that secretaries have a set of template letters ready for their lawyers to sign, congratulating clients on a new position, acquisition, activity in a charitable event and so forth. You should also ask your secretary to note clients' birthdays and anniversaries on your calendar so that you can send personal notes on the appropriate dates.

In addition, lawyers should ask their secretaries and legal assistants for insights on how client service can be improved. After all, who are the best up-close observers of a lawyer's client relations practices? Ask, Do they face any obstacles to doing a better job for your clients? What ideas do they have on how to better respond to your clients' needs? Work as a team. Imagine how you would feel if you walked into your bank or doctor's office and everyone greeted you by name and cared that you were getting the very best service.

Issuing Press Releases

You don't need a consultant or PR firm to issue simple releases on news that doesn't involve your clients. Many small firms—with the indispensable participation of their secretaries, legal assistants or other staff members—set up their own systems for issuing press releases about firm news, such as board appointments, books and articles published, honors bestowed and the like.

Once you have a basic news release template and an up-to-date mailing list of reporters at news, business, industry, legal, alumni and local periodicals—those who might be interested in news about you or your firm—a staff person can take it from there. When you have newsworthy developments to publicize, the staff member can prepare a draft of the release for your review, then give the media mailing list to you so you can check off where the release should be sent. Then he or she makes the appropriate number of copies, pops them into envelopes (with labeled photos, if necessary) and mails out the releases.

Importantly, the staff member maintains the mailing list of reporters, too. Because there is so much transition within the media, it is key for the staff member to update the mailing list every three months by calling each publication and asking if the reporter on your list is still the person to whom news on this topic should be sent.

Also, you'll want to ask your secretary or assistant to scan the periodicals that were sent the release to see if they picked up your news.

A Hidden Benefit: A Boost to Staff Morale

Marketing successfully can take a lot of time and detail work. Fortunately, your staff can do a great deal of the legwork for you. This alone is a great reason to educate your staff on how they can help you with marketing.

But here is another benefit: If you give capable people more to do than just file and type, they will grow with their jobs and be much more satisfied in their work. Providing individuals with more responsibilities, giving them new skills and making them feel that they are a necessary part of the team will boost their morale and make them happier and more productive employees.

Even more to the point, as active and educated participants in your practice, they will be able to help you deliver outstanding service to clients and grow your firm's bottom line. ■

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