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A Tale From the War Room: How One Law Firm Started 2018 Right

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Special to the Legal

I thought I would begin 2018 by telling you about a very industrious and special law firm—that will remain anonymous—which has begun the year in an outstanding way from a marketing perspective. I have the great privilege of working with some of the best lawyers in the state and this firm is at the top of my list—now more than ever. This is because the firm has kicked off 2018 by having its lawyers engage in what some feel is the most important client development activity any firm can do—an in-person client interview.

Here is how it organized the effort. In early January, all lawyers in this firm met in its main office to learn about the client-interview process—how to do



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one, what to ask, how to follow up and more.

After the hour or so tutorial, we ran through a list of value-added services I had prepared to identify what we could do for clients after or at the interview that would not cost the client anything. We did the same for key referral sources.

Then we headed out of the conference room en masse to what I will call the “war room.” I named our efforts a

military strike of sorts because for 15 treasured clients of the firm, we were going to strategically map out how we would enhance the personal and professional lives of these clients in the months to come.

Thankfully, the war room had a huge wall. And so, I began to write on index cards the names of 15 clients and the name of the specific lawyer in the firm who would be in charge of interviewing them. What was key was that everyone have a role in the process—not just the lawyers with the biggest book of business. Each lawyer in the firm, no matter their age, had to feel invested in this effort and take responsibility for growing the firm’s practice this year. The firm’s leadership and outstanding administrators made sure at this meeting that everyone understood that this effort was not

just mandatory but very blessed in terms of the time commitment that would be involved.

The index card with the client's name went on the very top of the wall. Soon there were 15 names lined up on the wall. Columns were being created for each client to delineate the activity to be done and deadline date.

The next index card that went under each client's name read in green ink: "Client Interview to be done by Feb. 1." The third index card in the column then read: Feb. 2: "Get back to client with progress report on what was discussed at the interview." It is key when a client gives you constructive criticism or suggestions that you jump on these comments and remediate to the best of your ability right away. If you are not willing to do so, the whole effort will be for naught.

The last index card I placed in each column read: "Next step" with a date the week later for all lawyers to reconvene as a group and discuss how the interviews went and what we learned from them. At this same meeting in early February, we will place a fifth index card in each column on

the wall to indicate the very specific action item the lawyer will take to provide value to the client. There will be a deadline of Feb. 29 for these next actions.

In early March, we will reconvene to brainstorm on the next

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"touch" and to learn from one another's efforts. And we will continue to add an index card to each client's column on the wall to indicate what we will do for the following month and the next.

The cards remain up on the wall in the war room and will for months to come. They serve as a visible reminder that we have a specific plan and direction in front of us. There will

be few random acts of marketing in 2018 because everyone is being held accountable at these monthly meetings to do what they said they would do and share their experience as to what worked and what did not. And we will not stop meeting till the end of year. Research will be a key component of this effort—to help each lawyer understand as much about the client's world as possible. Press releases on the client's website, internet searches, Google alerts and more will be employed to stay on top of the client's business, goals and aspirations.

It's your turn to create your own military strategy and war room. As always, I am rooting for you and look forward to hearing how you fare. •