

Marketing

Before You Leave: Making the Marketing Handoff

SALLY J. SCHMIDT | From a marketing perspective, there are many opportunities and relationships that can and should be transitioned. First and most important, of course, are those involving existing clients. But the opportunities also run to professional and community organizations, referral sources and even the media.

Many lawyers spend their entire careers building their profiles and refining their marketing activities. Over the years, for example, a lawyer might progress from the Young Lawyers Section of the local bar association to a statewide bar committee and finally to the chairmanship of a prestigious ABA committee. The initiative and hard work reflect well on the firm and, among other things, result in long-term relationships that keep new referrals flowing. Then the lawyer retires, and *poof*, that prestige and those relationships disappear with her.

But it doesn't have to be that way—if, that is, the lawyer and the firm together prepare to move important relationships and opportunities to others in the firm. Here is a checklist



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for transitioning vital marketing-related assets before a partner retires.

Clients: Bringing in New Relationship Managers

Client relationships are the most important asset that a retiring partner can transfer to the firm. If you don't give clients the opportunity, or enough time, to build relationships with others in the firm, they are vulnerable to poaching by competitors. Partners who are winding down their careers should make the following steps priorities:

- Inventory key client relationships and determine for each client who within the firm would be the best successor for the role as client relationship manager.

- Actively introduce the successor-lawyers into the client relationships—and the sooner the better. It takes time to develop the kind of trust and confidence that clients require from their counselors. You will want to make the successor visible to the

client through legal work as well as social interaction.

- Follow up with clients to be certain they are comfortable with their new relationship managers.

Organizations: Preserving Opportunities

Clients are not the only valuable assets that should be preserved for the firm and carefully transitioned. Often senior lawyers have spent decades cultivating leadership positions or other advantageous roles in important organizations. For some, those roles might be related to community activities, such as chairing the United Way drive or a chamber of commerce committee. Others may have focused on legal-specific organizations, earning roles in bar leadership or being inducted into the American College of Trust and Estate Counsel, for example. For still others, marketing might have been maximized through more social pursuits, like membership in a country club or a private networking group.

It will benefit the firm immensely to have the assistance of the senior partner in helping the firm retain these opportunities. Obviously, it is easier to pass the torch for some activities than others. Getting another lawyer involved in a breakfast club might be as simple as asking him to attend; securing a spot in an "invitation-only" membership group is another thing. But with proper planning and sufficient time, it may be possible to pass the torch even with the most elite groups and positions—