

# 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—

by, for example, the senior partner using his or her relationships to get a colleague nominated for a post in an organization. At a minimum, it may be possible to get someone on track to assume such positions in the future.

In addition, in many instances, it would be helpful if the senior partner would take steps like these:

- Actively introduce the colleague to key contacts in the organization, such as the executive director.
- Accompany the colleague to meetings for a period of time to assist with the handoff and help the colleague “by association.”
- Give the lawyer assuming the position tips on how to be effective in the group. For example, what are the best ways to become involved? Which committees are the most high-profile or prestigious? How can the lawyer build relationships and become indispensable to the organization?

#### Other Relationships and Opportunities

Similarly, there are other opportunities and contacts that retiring lawyers should try to transfer to benefit the lawyers remaining at the firm. Here are key categories.

- **Referral sources.** Certain individuals may have consistently sent quality work to the partner over the years. For example, the senior partner might have received a steady stream of referrals from another senior person at an accounting firm. Although

it may not be effective to introduce the senior accountant to a younger lawyer, it makes sense to identify a contemporary of the lawyer at the same accounting firm and to facilitate introductions.

- **Publications.** Relationships with editors of publications who sought or accepted the senior lawyer’s articles should be kept within the firm, if at all possible. By helping a successor-lawyer to publish in the same vehicles, perhaps first as a co-author with the senior lawyer, it may be possible to retain these publishing opportunities.

- **Journalists.** If the senior lawyer has been a resource for certain members of the media, he or she should introduce the reporter to a colleague who can start to build a relationship, serve as a resource and provide quotes for articles, and ideally continue to generate publicity for the firm.

#### ■ Teaching and speaking engagements.

A senior lawyer who receives frequent requests to speak or teach can introduce a colleague into the process by first co-presenting or inviting a colleague to participate on a panel. Ultimately, the successor can build his or her own reputation. It would also be helpful if the senior lawyer could bequeath relevant materials such as program outlines or slides.

#### Internal Knowledge:

##### Sharing Proven Tactics

Lastly, in the course of building their relationships, many senior partners have accumulated valuable tried-and-true strategies, which often can be

passed on to others. For example, does the retiring lawyer have specific methods that have resulted in marketing success? Is there a particular tactic or “habit” that has proven effective in growing relationships, such as breakfast meetings with good clients once a month? How does this partner prepare for business development meetings? What have been the most effective ways to follow up with networking contacts?

The partner’s experience and wisdom can be passed along in different ways. Best, of course, is to have someone shadow the partner, such as having the successor-lawyer go along to client meetings, having the younger lawyer assist in researching a prospect, or providing the lawyer with effective tools (such as a quality contact management system). The information can also be imparted through internal workshops—for example, the firm might organize a program with the senior lawyer as a presenter on topflight strategies for developing business.

#### Timing Means Everything

While many senior lawyers have good intentions, the truth is they often fail to transition their relationships and marketing opportunities because they simply run out of time. As with most things, marketing succession strategies should be set down in a well-thought-out written plan, outlining the activities to be undertaken and deadlines to be met. In this way, the firm can continue to build on the hard work and success of the senior lawyer and preserve both the lawyer’s and the firm’s legacy. ■