

Not Getting Away From It All

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THE MARKETING RETREAT is an old idea with a new twist. Law firms traditionally have used a retreat to discuss financial, management, or other strategic and operational issues. Now, as more firms become interested in marketing, they are using retreats to tackle strategic and

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tactical marketing issues.

Retreats are an excellent way to get the lawyers to discuss key issues during uninterrupted time away from the office. By devoting a retreat to marketing, a firm actually accomplishes more than the particulars on its scheduled agenda. Above all, it communicates to the lawyers that marketing is important.

Objectives:

These should be delineated before the agenda is written. Areas that could be covered include:

- **Cross selling:** Learning more about the capabilities of the individual lawyers and the firm as a whole.
- **Training:** Orienting the attorneys to "think marketing," or instructing them on how to be better marketers.
- **Policy making:** Deciding on firm policies, procedures, or systems with respect to marketing.
- **Planning:** Brainstorming about what the future holds for the firm.
- **Identifying specific opportunities:** Discussing specific clients or prospects which have business potential.
- **Gaining consensus:** Presenting firm marketing goals or activities for discussion or adoption.

Activities

To encourage cross selling, the key is to teach the lawyers more about "the product" (the firm) so they are better able to sell it. One 40-lawyer Minnesota law firm had equal and separate corporate and insurance defense practices. The business lawyers felt the insurance lawyers had a lot of unused contacts and potential for business development, but the insurance lawyers claimed not to know a real estate transaction from a tax matter. The firm used its marketing

retreat to introduce the two departments to each other. Each department prepared and presented a description of its practice: range of services, clientele, depth of expertise, areas of interest, and, perhaps most importantly, how the lawyers felt the other department could be of assistance.

You might also consider asking each lawyer to make a brief presentation on his or her practice, interests, organizational affiliations, or background. Representatives of specific practice areas could make a presentation outlining what information others need in order to sell that practice. (For example, the best times to bring up estate planning are after a client's change of marital status, birth of a child, relocation, etc.)

Actual marketing training can be incorporated easily into a retreat. Possible topics include:

- An Orientation to Marketing.
- Networking.
- Creating a Personal Marketing Plan.
- Selling Your Services.
- Improving Client Relations.

In giving its lawyers and paralegals what they needed to develop personal marketing plans, one 80-attorney Wisconsin firm brought in a speaker who walked through the individual planning process. Then it assembled a panel of firm lawyers who described their own efforts to carve out a niche for their practice. A firm might also consider inviting a client (or panel of clients) to talk about such issues as their use of outside counsel, changes in their industry, and their likes and dislikes in dealing with lawyers.

Often when a firm decides to begin its marketing efforts, there are no policies or procedures in place. What about compensation for business development? Approval and reimbursement for marketing expenditures?

When one Ohio firm used part of its marketing retreat to discuss attorney reimbursement, various partners were asked to investigate other firms' policies on this matter (for example, do they cover country club dues?) and bring their findings back for discussion. Then, before the retreat was over, the firm adopted its own policies.

One of the best uses for a marketing retreat is simply to brainstorm. Attorneys are informal researchers. Through their work and the contacts they make, they learn a great deal about hot areas and client concerns. They often know about competitors, about changes in client companies or industries, and potential new deals. (The problem is, there is usually no forum for attorneys to regularly report their "intelligence" to the firm.)

An Ohio law firm used its marketing retreat to collect and discuss the attorneys' ideas about the future of the firm. What practice areas hold the most potential? What markets (geographic or industry-related) seem most promising?

What trends in the community, among clients, or the profession will affect the firm? The attorneys then set priorities and created plans of action to capitalize on what they knew.

Similarly, lawyers often have strong ideas about which specific clients, prospects, or referral sources offer the best opportunities for additional work.

In a retreat, attorneys can share the names of companies and individuals and discuss the best ways to approach each prospect. They can then organize teams of lawyers to make the contacts in the year ahead.

Finally, many firms use a retreat to present and gain consensus for their marketing plan. Although the development of a plan requires the participation of only a small number of people, the execution requires commitment from the whole firm.

A large Chicago law firm used a retreat to discuss steps it planned to take in its marketing program. Partners not actually involved in the preparation of the plan proposed several suggestions which made the activities more acceptable or achievable, and then gave their approval.

Tips for An Effective Retreat

- **Have a goal.** Don't try to do too much. Focus the retreat on one or two major areas, and keep a close rein on the topics to be discussed. Use a professional facilitator if it is your first retreat. It will encourage more candid discussion.

- **Require advance preparation.** Don't let people think they can just show up; the retreat should be billed as a working session. Participants can be required to read or research prior to the meeting. Use questionnaires to solicit information or opinions in advance; the results can be discussed at the meeting.

- **Carefully consider whom to invite.** Depending on the objectives of the retreat, firms have invited just partners, all lawyers, lawyers and paralegals, or just administrative staff. Think about what you are trying to accomplish or communicate, and whose help will be required.

- **Encourage social interaction.** Plan some activities to encourage participants to mix and talk. Successful marketing requires interaction. The more that people know and like each other, the easier marketing will be.

- **Don't leave without a plan for follow up.** Talk about how the policies will be put in place, how each department's activities will be monitored, or how the brainstorming ideas will be used. Plan specifically what actions will result, by whom, and when.

The marketing retreat can be an extremely effective tool for building awareness, understanding, and participation in the firm's marketing efforts. Although a well-run retreat involves a great deal of planning and some cost, the results are well worth it. **ILT**