

Play to Win

**Marketing Discreetly  
Ways to market your experience without violating client confidences.**

By [Sally J. Schmidt](https://www.attorneyatwork.com/author/sally-j-schmidt/) September 20, 2018



I will always remember a feedback interview I conducted with a very wealthy client of a law firm. The client used the firm for a wide range of services, both business and personal. When discussing what he valued in his relationship with the firm, the client stated that the primary attorney was incredibly discreet. He said, “I was talking to someone recently who also knows my lawyer really well and he didn’t even know I worked with that firm.”

I contrast that with a recent conversation where a lawyer (not a client of mine) was talking about his experience and clientele. Now, I am the first person to say that showcasing things you’ve done for clients is a very effective marketing technique. However, it needs to be done properly. Not only did this particular lawyer name names, but he also threw one client under the bus for not consulting with the firm before signing a contract that ultimately led to a dispute.

Not only are there ethics rules prohibiting breaches of client confidentiality, doing so can damage your business development efforts. Prospective clients are thinking, “Will this lawyer be talking about me like that someday?”

**Touting Your Experience: How to Do It Right**

Touting your experience is still effective, whether in profiles, publishing or speaking. However, here are things to consider as you do so.

**1. Include representative matters in your website bio and LinkedIn profile.** But be sure to:

* Get client permission to use their names or cite their matters, even if they are in the public record. There are times a client may not wish to bring any more attention to an issue despite your good result.
* Word representative matters in such a way that no one can guess who was involved.
* Aggregate your matters. It can be effective to say things like, “In the last five years, I have represented 10 private equity companies in deals worth a collective $X dollars” or “I have worked with 40 percent of the largest restaurants in the state to help them avoid problems with their employees.”

**2. Use clients as examples, referral sources or references.** But be sure to:

* Ask for permission before giving out client names, whether it’s for Chambers and Partners or a specific prospective client who might call, and give clients a context for the call. This will be helpful to them in formulating a response, and it will also make their comments more effective.
* Ask clients who send you a complimentary note whether they would be willing to add it to your LinkedIn profile.
* If you will be referencing a client matter in your articles or presentations, be sure to get approval.

**3. Let clients tell your story and have others glean your experience by association.** For example:

* Ask a client to present with you at an industry conference or firm seminar.
* Invite a client to co-author an article with you.
* Put together several clients to serve on a panel or convene as an advisory board.

Lastly (but not least), of course: Whenever you intend to discuss a client or a matter, be sure you do so in accordance with your jurisdiction’s rules of professional conduct.

**Be Discreet!**

There’s a fine line between effective marketing and indiscretion. Your experience is an incredibly valuable part of your marketing message and you want to tout it, but be sure to protect client confidences along the way.