

Better Marketing, One Container at a Time

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I heard an expert on organizing say that the biggest mistake people make, whether they are tackling their closets or their desks, is to buy baskets, bins and containers. Her advice was to take an inventory of what you have, figure out what you really need and determine how you use it. Then—and only then—do you buy containers.

I thought it sounded a lot like a law firm approach to knowledge management (KM), perhaps the hottest trend in professional service firms. Knowledge management is the discipline of managing the firm's intangibles and "intellectual capital"—which includes experiences, relationships, ideas or processes—and making them available throughout the firm. Many people believe that using this internal knowledge effectively can determine a law firm's future competitiveness and success.

Yet law firms often start the process of knowledge management like organizing a closet. They look for the software or system that will tidy it up neatly, instead of taking a realistic assessment of how the firm can capture and share information.



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How Knowledge Management and Marketing Intersect

While the jargon may come and go, knowledge management is more than a passing trend. The concept can be an integral part of how your firm operates. Knowledge management has enormous implications for the effectiveness of a firm's marketing program. For example:

Referrals. Have you ever seen an internal memo or e-mail inquiring, "Does anyone know a litigator in Des Moines?"

Client service. What process is in place to ensure that all lawyers assigned to a particular client's matters are educated about the client's quirks and requirements, such as billing guidelines?

Mailings. Has the firm ever sent two, three (or 25) holiday cards to the same client, each signed by a different lawyer?

How can a law firm capture and share its intellectual capital and turn it into marketing strategy? By taking stock of its needs, first.

Pitches for business. Have the lawyers ever scrambled around the day before a proposal was due to develop a list of representative transactions for a prospective client?

Getting Started

Regardless of firm size, management of knowledge will make a firm's marketing efforts more effective and efficient. Yet it can seem overwhelming in terms of time and expense. As your firm begins to look at how it might implement a knowledge management program for marketing, here are some logical and important places you might start.

Relationship database. Management of client and contact information is a key to marketing success. Begin by merging all the party invitation lists, newsletter mailing lists and client lists into one marketing database that allows you to track your firm's relationships. Ideally, this database will interact with your firm's time and billing system, so you can access better information. For example, produce a list of the firm's top 50 clients to receive a special letter from the firm's managing partner or a report that indicates the best sources of business for each of the firm's practice areas. Even if this isn't possible, use a data-

base software package or enhance your existing system to include some key fields, such as the source of the contact; the contact's relationship with the firm; the industry of the company; the practice areas used by clients and other areas that make sense for your firm (for example, recipients of specific mailings, form of entity or date of incorporation).

Intake form and procedure. One of the most important elements of relationship management is the client intake process. You should take a good look at your firm's form and system and ask yourself: Are we collecting the infor-

mation we need? Are we using it in a way that builds our knowledge base? For example, is it useful to indicate if a company is unionized so that we can provide future updates about labor-related issues?

Repository of proposals. If your firm sends proposals or letters of qualification to prospective clients, you should make certain you have a repository so future efforts do not “reinvent the wheel.” Whether it’s the firm’s librarian, marketing staff or administrator, someone should keep the information and make it well-known to everyone in the firm. Electronic availability allows people to download lawyer biographies, descriptions of practice areas, lists of representative transactions or PowerPoint presentations for their own use. But even if your first step is a file of hard copies with a table of contents, it’s better than nothing.

Article and presentation database. An effective way to organize the lawyers’ areas of expertise is to create a database of articles and presentations. By listing the topic as well as the date and place of publication or presentation and making copies accessible, others in the firm can look for appropriate uses. They can include a relevant article reprint in a prospective client letter or use prior seminar outlines or materials instead of starting from scratch.

Lawyer background and expertise database. To get a better handle on the capabilities of the firm’s lawyers, you can start with their Martindale-Hubbell forms or a simple form that collects: education (school, date), bar admissions, specialties, languages spoken or organizational affiliations. This information can be accessed when developing client teams or putting together pitches.

Deal, case or transaction lists. Perhaps most important is to maintain lists or databases of the firm’s results. Clients are “buying” what your firm has done for other people. The more you can show specific information related to your experience, the better. For firms with matters of public record, it can mean listing specific cases. Where client confidentiality must be maintained, it could mean sanitized descriptions, such as “Represented developer in leasing of major shopping center space.”

What Will Your Firm Put In the Boxes?

Organizing your firm’s intangible resources will give you a distinct competitive and marketing advantage. However, knowledge management doesn’t just happen. The process needs to be managed, rewarded and sustained. It is a way of doing business.

As you begin your marketing knowledge management efforts, be certain to do what’s right for your firm. If you can start with a piece or component that people find of immediate value by saving time or improving their results, your future efforts to collect and share information will be much more successful. ■

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