PROVEN PRACTICE GROUP MARKETING TECHNIQUES

Presented by
Joel A. Rose, President
Joel A. Rose & Associates, Inc.
Cherry Hill, New Jersey

for the

Delaware Valley Law Firm Marketing Group
Luncheon Meeting
on
Tuesday, October 24, 2006

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Joel A. Rose & Associates, Inc.
Management Consultants to Law Offices
1766 Rolling Lane
P.O. Box 162
Cherry Hill, New Jersey 08003
Telephone: (856) 427-0050/Facsimile: (856) 429-0073
Website: www.joelarose.com
E-mail: jrose63827@aol.com

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I. Introduction

A. I'm delighted to be with you today:

I've been asked to describe strategies especially designed to enable Marketing Directors to work hand-in-glove with lawyers to make marketing an integral part of their Practice Group business plan.

B. My outline contains examples of forms and illustrative marketing plans employed by Marketing Directors in financially and professionally successful law firms to assist their practice groups develop:

1. A marketing culture,

2. Methodology for establishing marketing goals,

3. The process for planning, organizing and implementing Practice Group client development planning efforts,

4. A Marketing Matrix that describes the Firm's expectations of its attorneys, and

5. Performance measures to establish performance expectations of attorneys in practice groups, to provide support and guidance, and to set performance expectations and evaluations.

C. **I will do as much of this as possible within the time limitations. However, first I want you to understand that as a management consultant to law offices, I deal with the practicalities of helping attorneys in law firms increase their revenue and profitability.**

1. Marketing is the key way to enhance revenue and profitability.

2. The most successful "rainmakers" in law firms have developed - intuitively or as the result of much practice - a "marketing state of mind" that is grounded on the fundamentals of:

   a. Client service,
   b. Cross-selling the firm's expertise to every client, and
   c. Maximizing market opportunities in each of the markets in which the firm practices.

3. The strategies and marketing activities that I will describe today have been implemented by partners in larger law firms with more than a fair degree of success.

II. <u>Organization of Practice Group Client Development Efforts</u>

A. **Practice groups that focus on(1) substantive areas of practice and (2) industrial classifications are increasingly becoming the way law firms manage their businesses, including a significant component of their Marketing efforts/activities.**

1. Too many law firms market their practices by areas of law, whereas, executives of clients' businesses focus on their business and industry concerns, and prefer their law firms to do the same.

2. Those attorneys who focus their attention on the clients' business and industry concerns also promote cross-selling of legal services, i.e., they are able to identify which real estate, corporate, tax and other areas of their firm's expertise may be tailored to satisfy their client's needs.

3. It is no coincidence that attorneys in most of the more financially and professionally successful law firms have developed a "marketing mind-set" that is an inherent part of their firm's culture.

B. Levels of Leadership within a Law Firm that Need to be Involved to Develop a "Marketing Mind-set" Culture for Client Development

1. Senior Firm Leadership Needs to be Passionate about Marketing, i.e., Managing Partner and/or Executive Committee

2. Practice Group or Department Chairs must be supportive of the Marketing Culture

3. Client Development or Marketing Department Chair must be willing to devote the time and effort to plan, coordinate the implementation of the marketing program and be willing to recommend that corrective action be taken, as required.

4. Individual Attorneys must be willing to subordinate some of their independence for the good of the firm and be accountable for their actions or inactions that relate to marketing the firm's legal services.

5. Marketing Director must:

   a. Possess the expertise in marketing professional services,

   b. Understand that he or she must take a longer-term view of the marketing function in terms of developing and implementing the firm's marketing plans and evolving results.

   c. Be capable of perceiving short term set-backs as just that, rather than crushing setbacks.

   d. Be realistic about what action plans and results may be delivered, especially since there are so many variables that the Marketing Director cannot control.

   e. Constantly look for more ways to guide the firm and its lawyers so that it is capable of remaining competitive in the fast-changing, highly competitive legal market(s) in which the firm practices.

   f. Recognize that generally, attorneys are risk adverse and may be satisfied with the status quo.

   g. Understand that he or she is an agent of change and as such, lives with the daily challenge of motivating attorneys to embrace the concept and practice of marketing the firm's legal expertise to existing and potential clients.

h. Possess excellent verbal and written skills, especially in the legal environment in which every word, and how it is articulated, may make the difference between a successful and unsuccessful client assignment.

i. Be an excellent leader and team builder.

j. Be an advocate for the client in order to plan and implement programs that are designed to attract and retain clients.

k. Make sure that you deliver everything that you promise in a high quality, timely and cost-effective manner.

6. Additional marketing, advertising or public relations professionals - who will be called upon by the Marketing Director or the Chair of the Marketing Committee, as required.

III. The Firm Should Embrace as an Inherent Component of its Culture a Practice Group Approach to Client Development

A. Develop an Appropriate Firm Culture for Client Development

1. Develop an identifiable and desirable firm culture

2. Develop a culture of client development

3. Develop a team or practice group approach to client development

   a. Importance of buy-in by Senior Firm Leadership and Practice Group or Department Chairs

   b. Significance of compensation system

4. Some elements of "structure" is required to Establish and Implement within the firm a marketing mind-set that includes the Client Development Culture

   a. Set clear expectations for non-billable time devoted to marketing - fixed time commitments, i.e., 200 hours a year for partners and 100 hours a year for associates vs. variable time commitments based upon each attorney's historical marketing performance, interest in marketing, willingness to devote the time to marketing, etc.

b. Incorporate marketing into the criteria to progress to partner status, i.e., is just doing excellent legal work sufficient for an associate to progress to equity partner status?

c. Create marketing plans at every level, i.e., firm, practice group, individual attorney. The marketing plans should be written, simple and focused, and should set short-term goals in the pursuit of longer term marketing objectives - see sample planning forms.

d. Monitor marketing performance expectations - see the Marketing Matrix in the hand-out material. Praise the over achievers and counsel the laggards. Most marketing initiatives have to be repeated several times before they begin to pay-off. Because of the lag-time between initiating the marketing initiatives and the positive return, rewarding only positive results may not be sufficient. Consider rewarding effort that supports the marketing plan.

e. Communicate marketing successes using personal communications, intranet postings, internal news letters, monthly status reports, etc.

f. Be willing to devote the time and energy to assess marketing initiatives before they are implemented and monitor the results.

g. Create a forum for marketing accountability - Schedule monthly marketing forums for members of practice groups where members may report on the results of their efforts - both positive and negative; share leads and marketing ideas that work; distribute minutes and make sure the results are reported through reports, newsletters and practice group meetings and presentations.

h. Establish a Key Client (Prospects) Program - with one (or more) partner(s) designated to serve as the Client Relationship Manager for each Key Client, with responsibility for learning the client's business, insuring the client's total satisfaction, responding to any of the client's concerns immediately and as measured through periodic client satisfaction audits, etc.

5. Branding Your Firm and its Practice Groups

a. Establishing an identity for your firm and Practice Group. Making a positive impression in order to differentiate your law firm and/or its Practice Group(s) from other competing law firms with the capability of performing similar kinds of legal services.

b. This may be accomplished by evaluating the performance of the attorneys in your Practice Group from a client's perception since the client's perception is reality.

c. Understanding what clients and prospective clients want from their legal counsel.

(1) Help in solving problems.
(2) Help in preventing problems.
(3) Ways to save, retain or make money.
(4) Expertise in substantive matters.
(5) Expertise in the client's industry or field of business.
(6) Attention
(7) Availability
(8) New Ideas
(9) Timeliness
(10) Confidence - peace of mind.
(11) Name of a recognized expert.
(12) Being kept informed.
(13) Follow-up.
(14) General business counsel.
(15) Personal counsel.
(16) Value
(17) The "right chemistry."

d. Doing legal work vs. Serving the client

1. The importance of "adding value" to your client in addition to just doing legal work on a client file.

2. High quality work is not necessarily high quality service

e. Developing a "total marketing effort," a logo, a web-site with collateral material that is "crisp", current, easy to access and read, etc.

IV. Existing Clients

A. Accumulate data on existing clients

1. Easiest and most lucrative sources of new business

2. Examine opportunities for cross-selling

B. Formulate marketing plan for existing client

1. Involve those attorneys currently doing work and specialty you want to introduce

2. Set goals and require progress reports

C. Keep score of all new business

1. Publish internally all new work received, and from referrals

2. Show trend lines of the volume of new and profitable work from major and key clients by practice area

D. Attorneys should visit their major and key clients at least once a month to get to bond with their clients, know the clients' business and identify other legal issues

1. Go to your client's offices, e.g., house calls - Consider whether the client should be charged for these "educational" visits - to help them better understand their clients' objectives and to better enable lawyers to represent their clients

2. Meet key executives and operating managers

   a. Ask them about their jobs, their objectives and what obstacles they Delivering excellent legal services in a timely manner at fees that are fair to the client and the firm,

E. Managing Lawyer Expectations About the Firm's and Each Practice Group's Marketing Program and Setting a limited number of priorities

1. Making sure that the attorneys understand that all of the above steps and that the return on the investment of time and out of pocket costs and related expenses take time to develop and implement.

F. Budget and spend marketing dollars for marketing (2 to 3% of firm revenue)

G. Listen to your clients when they speak

1. Let them tell you what they are interested in

2. React to their expanded needs

3. Ask where their business is going, pressures and competition they face, and if applicable, if they are facing any legislative or regulatory concerns

4. Where and when practical, at the conclusion of every assignment, ask the client for their views on how the representation went - Do not charge for this visit

   a. Ask about: staffing, timeliness, fees, value received, etc.

   b. Use this opportunity to inquire about where the client's business is going, e.g., growing, downsizing, moving, requiring other kinds of specialized representation

   c. Cross-sell, when appropriate.

H. Marketing Simulations

1. I am a proponent of marketing simulation, role playing and rehearsals.

   a. Set up circumstances where lawyers call on each other in a firm, sitting next to another business person on an airplane of Amtrak train. One lawyer plays the client and the other person is the marketer.

   b. Practice asking questions and responding realistically so that when the attorneys encounter "real situations" they know how to respond placing the firm and his or her Practice Group in the most favorable light

V. A Case Study: Positioning this Firms' Labor and Employment Practice Group by Developing and Implementing a Practice Group Strategic Marketing Plan

A. Components of a Strategic Marketing Business Plan - determined by the Labor and Employment Group with the Approval of the Strategic Planning and Executive Committees. This plan includes:

1. Description of the Practice Group's Business

2. How the Group's expertise will be Marketed

3. Who is the Practice Group's Competition?

4. How will the Practice Group's Plan Operate?

5. Who will Staff it?

6. What are the Cost, Revenue and Profit Projections?

B. Getting to Cohesiveness and Profitability: The Firm's and the Labor and Employment Group's Collective and Individual Attorneys' Plans

1. Summary Financial/People Plan for the Labor and Employment Group

2. Practice/Industry Group Marketing Action Planning Form

   a. Target clients and potential clients

   b. Establish client teams within Practice Groups, as needed

   c. Importance of developing and implementing follow-up plans

   d. Take the time to reduce the Practice Group's plan to writing - identifying goals and objectives; determine the number and balance of expertise called for as staffing requirements; measuring results; etc.

   e. Monitor the plans and take corrective action, as required.

   f. Talk to your clients regularly about substantive and personal matters in order to personalize relationships, if appropriate.

3. Memorandum Re: Business Development Plan to be Presented to Labor Department Attorneys - This meeting will focus the Group's maximum effort where it has the potential for maximum payoff. It will also experiment in our Group's practice areas that cost less in terms of time and/or money.

4. Individual Attorney Business and Marketing Planning Form.

5. Principal Performance Input Form - which affords each Principal the opportunity to provide input on aspects of his/her performance for the preceding evaluation year and expectations for the forthcoming evaluation year.

6. Performance Measures - These performance measures describe performance expectations for principals and provide guidance for the evaluation teams and principals in setting performance expectations and evaluating performance for:

   a. Practice Development

   b. Client satisfaction

   c. Professional Development

   d. Firm Assignments

   e. Leadership

   f. People Development

   g. Firm Commitment

VI. Concluding Comments

Attachments

PRACTICE GROUP PLAN
LABOR AND EMPLOYMENT GROUP

SUMMARY FINANCIAL/PEOPLE PLAN

See attached financial information

OPERATING PLAN (STRATEGIES) – No more than 6 for the Group – A few accomplished is better than many forgotten

- We intend to grow the practice by an aggressive practice development effort which would consist of:

  1. Expanding labor representation of existing clients.

  2. Conducting seminars on the east and west side of the state, as well as holding breakfast updates.

  3. Making our attorneys more visible on a local, regional and national basis by participating in Bar and legal-related organizations and/or committees.

  4. Writing and publishing of articles in our area.

  5. Encouraging speaking engagements.

- Targeting of specific potential clients and/or industries such as automotive (companies and suppliers), education, K-12, colleges, universities, health care, high tech, banking/financial, retail and gaming.

- Putting together and marketing a major litigation team.

- Increasing profitability of special fee arrangements.

List top clients of the group.

Name	Revenue 2001	Revenue 2000	Revenue 1999
1.			
2.			
3.			
4.			
5.			

In the Labor and Employment Group, top clients may change from year to year, depending on whether we have a large matter going.

Describe plans to develop additional work for these or similar clients, including cross-selling other groups or lawyers within the firm.

- Above I have outlined a number of practice development initiatives that will be undertaken. Historically, the Labor and Employment group has liked to work with other practice groups in developing business and we will continue to do so. In fact, if we don't do more inter-group practice development, I believe our ability to succeed will diminish, that is for the group as well as for the firm.

Plan your meeting schedule (publish to all members of the group), your recurring agenda items, your routine reports and other methods you'll use to track and measure performance during _______.

We have monthly meetings wherein the monthly blue sheets are discussed, as well as practice development, and we also have substantive issues brought up and discussed. We also regularly discuss practice development efforts, workloads and active cases and current developments in the law.

Our four most important goals for the group for next year (____).

1. Expand work with existing clients.

2. Obtain work from clients that we are not doing labor and employment work for.

3. Address profitability of fee arrangements.

4. Addressing retention of attorneys.

MEMORANDUM

Dear Gang:

The following are the legs of the practice development plan which will be discussed at our January 11 meeting. Some of these are things that we are already doing, and some are obvious. Others are new and may prove to be less useful. I am mindful of recent advice that when I find myself riding a dead horse, it is best to dismount. We will heed that wisdom where appropriate, but I am also mindful of the Lottery's motto, "you can't win if you don't play," so if it has potential and only costs $1, we will try it.

One of our general guiding principles will be that we will focus maximum effort where we have the potential for maximum payoff. Therefore, we will experiment in areas that cost less in terms of time and/or money. I may well have forgotten to include something valuable. This plan is a work in progress and can be amended. However, we are going to try to focus ourselves slightly differently, so please do not assume that we will continue to support certain expenses just because we have done so in the past.

A. All efforts need to be coordinated within our department and with the rest of the firm.

[Describe How]

B. We will continue to participate in activities which raise the profile of our firm, our group, and our individual attorneys.

[Describe How]

1. Morning Updates

[Describe Plan]. **Participants: _________and________. Deadline: February 1**

2. Associate Speeches

[Describe Plan] **Participants: All Associates, Group Leader, and Firm Marketing Director. Deadline for topic identification: February 1**

3. Employment Law Alliance

[Describe Plan] **Participants: _________and________. Deadline: February 1**

4. American Bar Association and Other National Organization Meetings

[Describe Plan] **Participants: Numerous. Deadline: Varied.**

C. We need to focus more attention on contacts who can generate work.

[Describe Plan]

Participants: Everybody in the group. Deadline: before the department meeting on January 18.

D. We need to review and improve our marketing materials.

[Describe Plan] **Participants: ________, ___________, _______ and __________Deadline: March 1 for proposed changes, April 1 for implementation.**

E. We need to devote significant efforts to retain and grow business for institutions with which our relationships are in transition.

[Describe Plan] **Participants: All attorneys. Deadline: before the department meeting on January 18. Cultivation plan participants: __________, ________________, __________ and _______. Deadline: February 1.**

F. **We need to continue to move in circles where potential contacts can be made.**

[Describe Plan] **Participants: All attorneys. Deadline: February 1.**

G. **We need to continue to identify practice development opportunities.**

[Describe Plan] **Participants: All attorneys. Deadline: Ongoing.**

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PRACTICE/INDUSTRY GROUP MARKETING ACTION PLAN
________________ GROUP

[DATE]

I. Situation Analysis

A. Strengths of the group:

1.

2.

3.

B. Weaknesses of the group:

1.

2.

3.

C. Strengths and Weaknesses of the Firm as they affect the group:

1.

2.

3.

II. Identifying Opportunities

A. Identify three or more existing clients with cross-selling potential.

1.

2.

3.

B. Identify three or more prospective clients - specific individuals or companies.

1.

2.

3.

C. Identify three or more prospective client groups - industries or types.

1.

2.

3.

D. Identify three to five present or potential sources of referrals - industries, companies or individuals.

1.

2.

3.

IV. Recruiting and Training

A. Identify specific recruiting needs:

B. Identify the specific group training needs:

V. Setting Goals and Objectives

A. Short-term Goals

1. The group established the following three short-term goals

a.

b.

c.

2. In working towards these short-term goals, the group set the following one-year objectives:

Goal #1:

Objectives: 1.
2.
3.

Goal #2:

Objectives: 1.
2.
3.

Goal #3:

Objectives: 1.
2.
3.

B. Long-Term Goals

1. The group established the following three long-term goals:

a.

b.

c.

2. In working towards these long-term goals, the group set the following one to five year objectives:

Goal #1:

Objectives: 1.
2.
3.

Goal #2:

Objectives: 1.
2.
3.

Goal #3:

Objectives: 1.
2.
3.

V. Create Activity Responsibilities

SHORT TERM GOALS

Short Term Goals #1
Objective:

Activity	**Responsible Attorney(s)**	**Target Date**

Short Term Goals #2
Objective:

Activity	**Responsible Attorney(s)**	**Target Date**

Short Term Goals #3
Objective:

Activity	**Responsible Attorney(s)**	**Target Date**

LONG TERM GOALS

Long-Term Goal #1
Objective:

Activity	Responsible Attorney(s)	Target Date

Long-Term Goal #2
Objective:

Activity	Responsible Attorney(s)	Target Date

Long-Term Goal #3
Objective:

Activity	Responsible Attorney(s)	Target Date

Individual Attorney Business And Marketing Plan

Attorney: Date:

Practice Group: Environmental and Regulatory

I. External Activities

Indicate activities that you will personally undertake to accomplish this calendar year in the following categories:

A. **Memberships**

I will become an active member in:

1. **Bar Association Sections**
   a. **Environmental Law Section of the State Bar**

2. **Civic or Professional Organizations**
   a. **Troy Chamber of Commerce Board of Directors**
   b. **Troy Women's Business Forum Member**
   c. **Automation Alley—Marketing Committee Vice Chair**
   d. **Automation Alley Marketing Subcommittee on Internal Awareness**
   e. **Original Equipment Suppliers Association—work to get actively involved in the Environmental Council.**
   f. **Italian and American Business and Technology Alliance-IABAT**

3. **Other**
   a. **United Way Special Allocation II Committee Volunteer**
   b. **Public Speaker Bureau for the Organ Procurement Agency of Michigan and the National Kidney Foundation**

B. **Leadership**

I will work towards serving in a leadership position in the following:

Association/Organization	Position Desired to Attain	Target Date
Troy Chamber Bd. of Dirs.	Chairperson	
Original Equipment Suppliers Assn.	Environmental Council Member	
IABAT	To be determined	

C. Seminars and Presentations

I will participate in the planning of the following FIRM or outside sponsored seminar, as a primary or panel speaker:

Seminar Topic	Target Audience	Target Date
OSHA Compliance Update in MI	Safety and Env. Compliance Officers of Companies	

D. Articles

I will prepare the following articles as a primary or co-author:

Topic	Target Audience	Target Date
None		

E. Personal Development

I will undertake the following activities to help me develop my personal skills and level of professionalism:

CLEs, courses, films or tapes:

- Attend Leadership Training I & II.
- United Way Fundraising Coordinator for Troy Office.

Teaching or lecturing opportunities:

- Co-teach 2 Practice Development Classes.

Other:

- Serve on Firm's Recruitment and Diversity Committees.
- Actively promote the Firm's Auto Industry Group and expertise across practice groups.

II. Business Development Activities

A. Client Development and Retention

Identify existing clients whom you will regularly entertain by way of lunches, dinners, etc.:

Company Name	Contact	Target Date

B. Client Visits

Target Date

1. Identify clients who would be appropriate targets for inviting to visit one, or more, of our offices and make a presentation about their businesses to our attorneys:

2. Identify clients who would be appropriate targets for a group of FIRM attorneys to visit the offices of, and make a presentation to, on a timely issue of interest or concern:

C. Cross-Selling

Identify existing clients that you will introduce to another FIRM attorney for cross-selling purposes.

Client	FIRM Attorney	Description of Action and Outcome Goal

D. Prospects and Referrals

Identify prospects or referral sources whom you will regularly entertain by way of lunches, dinners, etc.:

Prospect or Referral Source	Activity
1. Various Italian Companies during SAE—	Attend Italian Consulate receptions
2. IABAT	Lunch—to discuss involvement with IABAT
3. OESA	Lunches to work on Environmental Council and more contact with members

E. New Business Development

Identify target prospects you will seek to develop new business from during the calendar year:

Target Prospect	Type of Legal Work	Activity
1	OSHA	Continuous Contact—Provide info. Set up meeting with
2.	Bus. Services	Work with to arrange meeting with General Counsel
3.	Env./Real Estate	Set up meeting to acquire a parcel
4.	Env.	Meet w/ (lunches, Euchre Parties) to discuss opportunities. Coordinate with re: same.
5.	Bus. Services	Lunches
6.	Env.	Assist Marketing efforts with large companies to fund and supply an …..
Continue various business correspondence with various local and foreign Italian Companies.		

III. Profitability and Productivity

Goals for	Hours	Detail or Description
Projected billable hours:	1700	
Projected marketing hours:	500	
Projected administrative hours:	200	
Projected other hours (describe):	80	Charitable/Pro Bono/ Hockey Game
Current billing rate(s):	$250	
% of Write-offs:	<3%	
Projected originations:	NA	
Other:		

MARKETING PLANNING FORM

You can customize a personal action plan by completing this template. There are 15 activities listed below. Your goal should be to complete as many of these as possible during the next six months. The more of them you do, the more likely you will be to attract new business and new clients.

1. Update database, biography and personal information

   a. Set up (or update) a data base of your network resources and contacts. Determine by what date you will have completed these activities.

      (1) Locate business cards and other scattered information by _______.

      (2) Determine the type of software database you will use by _______.

      (3) Database will be completed by _______.

   b. Update your biography to reflect specific experience and special skills.

      (1) Date by which this activity will be completed: _______.

   c. Circulate internal memos or e-mail notifying other lawyers of the specific skills, expertise or interests you have.

      (1) Date by which this activity will be completed: _______.

   d. Set up a system for measuring and monitoring the way you use your non-billable time.

      (1) The person with whom you need to speak to learn about options for recording my time is: _______

      (2) The date by which you will have a system in place to measure your non-billable time: _________.

2. List three individuals at key client companies with whom you will meet to discuss their level of satisfaction, and their ongoing legal and business needs.

   a. Clients (company and contact):

      (1)____
      (2)____
      (3)____

3. Think of one client with whom you would be willing to discuss an alternative fee structure. Write the client's name and the possible fee structure that you would be willing to propose to that client (retainer, fixed fees, free phone calls, success fee, etc.)

   a. Client: ______________________________

   b. Alternative Fee Idea:______________________________

   c. Date by which you will have a preliminary meeting to determine the client's interest in and possible preferences for an alternative fee structure: __________

4a. List three prospective clients for whom you believe you or your firm could do legal work.

(1)______________________________
(2)______________________________
(3)______________________________

4b. List the research methods you will use to learn more about their businesses. (For example, calling people in your network, reading relevant articles or annual reports, conducting on-line searches, visiting company websites, etc.)

(1)______________________________
(2)______________________________
(3)______________________________

4c. Date by which preliminary research will be completed:

(1)______________________________
(2)______________________________
(3)______________________________

4d. You will need to make a phone call or send a letter to set up an initial meeting with someone at each prospective client company to discuss their business and legal needs. This is a meeting to follow up on your research, gather information, and learn whether thee may be ways to assist the prospect in his or her business (this meeting is not to make a pitch). The date by which you will call the primary contact (or someone else) to set up a meeting for each prospective client is:

(1)______________________________
(2)______________________________
(3)______________________________

Note: If this meeting uncovers information that leads to ideas for ways in which you can provide value by performing certain legal services, you should ask to set up a meeting at which you can make a specific presentation.

5. Think of some people who have done an important favor for you, given you a referral or sent some extra business your way. Send that person a modest gift (book, golf balls, bottle of wine, etc.) or a handwritten note thanking them for their help, referral or work.

Name: ______________________________
Thank you gift idea (if not letter): ______________________________
Letter or gift to be sent by: ______________________________

Name: ______________________________
Thank you gift idea (if not letter): ______________________________
Letter or gift to be sent by: ______________________________

Name: ______________________________
Thank you gift idea (if not letter): ______________________________
Letter or gift to be sent by: ______________________________

6a. Think of three existing clients who may have additional legal needs that you or your firm are not currently serving:

Name of client #1: ______________________________
Possible additional legal needs: ______________________________

Name of client #2: ______________________________
Possible additional legal needs: ______________________________

Name of client #3: ______________________________
Possible additional legal needs: ______________________________

6b. Do some research, ask client contacts relevant questions, invest some time and explore from the client's point of view whether you can add value to the client's business by doing the work. List below the research methods you will use to learn more about their businesses. (For example: calling people in your network, reading relevant articles or annual reports, conducting on-line searches, visiting company websites, etc.)

Client #1: ______________________________
Date by which this activity will be completed: ______________________________

Client #2: ______________________________
Date by which this activity will be completed: ______________________________

Client #2: ______________________________
Date by which this activity will be completed: ______________________________

6c. You will need to make a phone call or send a letter to set up an initial meeting with someone at each client company to discuss their business and legal needs. This is a meeting to follow up on your research, gather information and learn whether there may be ways to assist the prospect in his or her business (this meeting is not to make a pitch). The date by which you will call the primary contact (or someone else) to set up a meeting is:

Client #1: ____________________
Client #2: ____________________
Client #3: ____________________

(Note: If this meeting uncovers information that leads to ideas for ways in which you can provide value by performing certain legal services, you should ask to set up a meeting at which you can make a specific presentation)

7a. Schedule a lunch or breakfast meeting with a client or contact and plan to do nothing but ask questions.

Name of person with whom you will have lunch: ____________________

7b. List some questions you might ask (e.g. How are you responding to industry consolidation, labor shortages, competition, etc.? What are your company's long-term business goals and strategies? What are your personal career plans? What have you seen lawyers do that you really like that you dislike? How can lawyers be more valuable to you? How often are you in a position to give referrals? Etc.)

____
____
____
____

8. Think of a client or contact who could benefit from a referral to someone else in your network.

a. Name of client or contact: ____________________

b. Person to whom you will introduce your client or contact: ____________________

c. Date by which you will make the introduction: ____________________

9. Think of a client whose business is extremely important to you. Suggest a brown bag lunch at which you (and possibly another lawyer in your office) will give the client some free advice or an update on some important legal or business developments.

a. Name of client: ____________________

b. Date by which you will call to offer the meeting: ____________________

c. List specific issues that you will propose for discussion, but let the client select the subject matter. Ideas might include: recent or pending legislature changes; how to avoid liability, use lawyers more efficiently, improve negotiation skills, position the company for growth, retain employees, etc.

____
____
____

10. Think of a business acquaintance with whom you once enjoyed a good relationship, but have not been in touch with for awhile. Reconnect with that person by letter of phone call. (For example, "Hi _____, I know I should have been better about staying in touch, but I thought it would be nice, if we could reconnect. . .) Designate a person below.

a. Name of person: ______________________________

b. Date by which you will contact this person: ______________

c. How? (Letter or call) ______________________________

11. Think of a client you would feel comfortable inviting to a social event, or with whom you could play golf, tennis, bridge, etc.)

a. Name of client: ______________________________

b. Event or activity: ______________________________

c. Date by which you will make the offer: ______________

12. Think of a friend, client, or business acquaintance whom you have wanted to introduce to one of your partners (because you know they could benefit from his or her specific knowledge or experience). Pick up the phone and make the call to set up the meeting.

a. Name of friend, client or acquaintance: ______________________

b. Name of partner or associate: ______________________________

c. Date by which you will call to introduce them: ______________

13. Suggest to a client that the next time you see them you would like to spend 15-20 minutes, off the clock, discussing their satisfaction or something relevant to their business, personal issues, some value-added ideas, a news story, or just to get to know each other better. Identify this client below.

    a. Name of client: ____________________

    b. Date of next face-to-face meeting: ____________________

    c. Possible topics of discussion: ____________________

    d. Date by which you will make the call to suggest the conversation: ________

14. "Active listening" is a secret weapon to building a practice. Ask a colleague, your secretary, marketing director or someone in your network if the know of any "active-listening" training programs that you can attend.

    a. Person you will ask for help locating the training program: ____________

    b. Date by which request will be made: ____________________

    c. Date by which you hope to have completed the training: ____________

15. Think of an upcoming client meeting that would typically take place at your office. Suggest that the meeting take place at the client's site of business.

    a. Name of client: ____________________

    b. Person you will call to suggest the change in meeting site: ____________

    c. Date by which you will make the call: ____________________

Reputation-Enhancing Marketing:

Allow yourself to pursue two of the following activities over the next six months, but devote an appropriate amount of time.

1. Contribute to a newsletter or client advisory.
2. Write an article for an industry or trade publication.
3. Make a speech at a business or industry conference or seminar.
4. Host a seminar on a specific legal or business subject.
5. Join a business or industry association or organization and participate actively on a committee.
6. Act as a host or sponsor for a charity or community service event.

MARKETING MATRIX

	PRESENT CLIENTS	REFERRAL SOURCES	POTENTIAL CLIENTS	PUBLIC VISIBILITY	INTERNAL
Associates Levels A-D*	• Perform Quality Work. • Develop client interaction skills through marketing training provided by Firm. • With the guidance of the client service principal, establish relationships with appropriate levels of client staff. • Return all calls ASAP. • Update voice mail daily.	• Maintain peer contacts. • Begin to create a mailing list. • Maintain MCP&S alumni contacts. • Create own list of possible referral sources.	• Begin building personal business contacts. • Identify potential new business opportunities and discuss with client service principal and/or mentor.	• Become involved in community and professional organizations for personal development as well as professional development. • Become active members of college and law school alumni organizations.	• Obtain knowledge of the range of firm services and firm materials. • Obtain knowledge of the various firm publications. • Develop marketing skills through marketing training provided by Firm. • Work with Group Leader or his/her designee to develop personal PD plan. • Create and update personal resume. • Keep marketing department advised of speeches, nominations, appointments and other promotional opportunities.
Associates Levels E-H and Senior Attorneys*	• Identify cross-selling opportunities. • Maintain client contact on regular basis with appropriate levels of client staff. • Identify and follow up with entertainment opportunities, including luncheons. • Understand your clients' industry and competition. • Return all calls ASAP. • Update voice mail daily.	• Expand business contacts to include other lawyers, other professionals and others who may be sources of referral business. • Regularly schedule luncheons w/potential referral sources.	• Assist in the drafting of proposals. • Develop a target list of potential business clients. • Subscribe to and write for trade publications for your potential clients' industries.	• Join industry or trade group. • Increase <u>active</u> involvement in community and professional organizations. • Obtain maximum visibility through articles, speeches, seminars and representation at public and social forums.	• Participate in group practice development activities. • Develop and implement personal practice development plan. • Continue to improve marketing and legal skills through marketing training provided by Firm, CLE and industry-specific seminars.

*At each new developmental level, it is expected that all attorneys will continue to practice and enhance the skills developed earlier. For example, performance of quality work is a continuing expectation from the first day an attorney joins

PRINCIPAL PERFORMANCE INPUT

Principal: ______________________________

Evaluation Period: ______________________________

The purpose of this document is to afford each Principal the opportunity to provide input on aspects of her/his performance for the preceding evaluation year and expectations for the forthcoming evaluation year.

While providing formal input is not mandatory, each Principal is strongly encouraged to complete and forward this document to her/his evaluation team. Evaluation teams will use this input in preparing draft Performance Evaluation and Performance Expectations reports.

PRACTICE DEVELOPMENT

1. Describe achievements and contributions related to **practice development** during the evaluation period (examples of client retention, client expansion, new clients obtained, collaboration in selling, participation in civic, charitable activities to promote goodwill)

2. Describe aspects of performance related to **practice development** that fell short of expectations during the evaluation period

3. Indicate what you believe should be your key performance expectations related to **practice development** for the next evaluation period

CLIENT SATISFACTION

1. Describe achievements and contributions related to **client satisfaction** during the evaluation period (examples of client feedback, referrals, references, etc.)

2. Describe aspects of performance related to **client satisfaction** that fell short of expectations during the evaluation period

3. Indicate what you believe should be your key performance expectations related to **client satisfaction** for the next evaluation period

PROFESSIONAL DEVELOPMENT

1. Describe achievements and contributions related to **professional development** during the evaluation period (execution of professional development plan, increasing expertise/technical skills, reputation, adherence to ethical rules and standards, enhancement of problem solving/analytical skills, creativity and effectiveness)

2. Describe aspects of performance related to **professional development** that fell short of expectations during the evaluation period

3. Indicate what you believe should be your key performance expectations related to **professional development** for the next evaluation period

FIRM ASSIGNMENTS

1. Describe achievements and contributions related to **firm assignments** during the evaluation period (examples of performance associated with special roles, committee assignments and special projects)

2. Describe aspects of performance related to **firm assignments** that fell short of expectations during the evaluation period

3. Indicate what you believe should be your key performance expectations related to **firm assignments** for the next evaluation period

LEADERSHIP

1. Describe achievements and contributions related to **leadership** during the evaluation period (examples of building consensus, developing unity and promoting firm objectives, participation in business planning, goal setting and visioning)

2. Describe aspects of performance related to **leadership** that fell short of expectations during the evaluation period

3. Indicate what you believe should be your key performance expectations related to **leadership** for the next evaluation period

PEOPLE DEVELOPMENT

1. Describe achievements and contributions related to **people development** during the evaluation period (examples of effectively participating in recruiting, mentoring, coaching, supervising, training and developing others)

2. Describe aspects of performance related to **people development** that fell short of expectations during the evaluation period

3. Indicate what you believe should be your key performance expectations related to **people development** for the next evaluation period

FIRM COMMITMENT

1. Describe achievements and contributions related to **firm commitment** during the evaluation period (adopting a firm-first orientation, supporting and contributing to firm initiatives, promoting collegiality, willing to give freely of personal and professional time to others, cooperating with group concept)

2. Describe aspects of performance related to **firm commitment** that fell short of expectations during the evaluation period

3. Indicate what you believe should be your key performance expectations related to **firm commitment** for the next evaluation period

SENIOR PRINCIPAL PERFORMANCE EXPECTATIONS AND EVALUATION

SENIOR PRINCIPAL: NAME **STEP:** 2 **EVALUATION PERIOD:** ENDED JUNE 30, 2004

PRACTICE DEVELOPMENT

Actively involved in attracting new clients, retaining existing clients, expanding work with existing or former clients. Cross sells other groups or lawyers. Collaborative in selling efforts. Participates in civic, charitable, community activities to promote goodwill.

Additional Expectations:

DNME	ME	EE

Comments:

CLIENT SATISFACTION

Positive client feedback

Additional Expectations:

DNME	ME	EE

Comments:

PROFESSIONAL DEVELOPMENT

Builds and maintains strong technical skills and reputation. Demonstrates problem solving skills, creativity and effectiveness. Adheres to ethical rules and standards.

Additional Expectations:

DNME	ME	EE

Comments:

FIRM ASSIGNMENTS

Serves in special roles, committee assignments, and special projects

Additional Expectations:

DNME	ME	EE	NA

Comments:

LEADERSHIP

Builds consensus, develops unity and promotes firm objectives. Participates in business planning, goal setting and visioning.

Additional Expectations:

DNME	ME	EE

Comments:

PEOPLE DEVELOPMENT

Effectively participates in recruiting, mentoring, coaching, supervising, training & developing principals, associates and staff.

Additional Expectations:

DNME	ME	EE

Comments:

FIRM COMMITMENT

Adopts a firm-first orientation, cooperates with group concept, promotes collegiality, gives freely of personal and professional time to others.

Additional Expectations:

DNME	ME	EE

Comments:

EE – Exceeds Expectations – *Requires Comments*
ME – Meets Expectations – *Comments Encouraged*
DNME – Does Not Meet Expectations – *Requires Comments*
NA – Not Applicable

PERSONAL ECONOMICS - NAME

PERFORMANCE MEASURE	2004 EVALUATION YEAR	STEP MEDIAN	2005 EXPECTATIONS
Working Fees	$275,757	$373,890	
Originating Fees	$187,767	$276,482	
Billing Fees	$296,516	$241,785	
Responsible Fees	$251,372	$347,277	
Billable Hours	1,489	1,611	
Quality Non-Billable Hours	1,358	289	
Est. Realization *(% of Preferred Client Rate – Billing Fees)*	68.5%	86.5%	
Est. Days *(WIP, A/R – Billing Fees)*	109	101	

***Comments**: (Note: Comments should include economic impact of discounted work)*

SETTING EXPECTATIONS | **MEETING DATE**

Principal
Group Leader/Dep.
CEO/Mgr. Dir.

EVALUATION | **MEETING DATE**

Principal
Group Leader/Dep.
CEO/Mgr. Dir.

GROUP LEADER PERFORMANCE EXPECTATIONS AND EVALUATION

GROUP LEADER: NAME **GROUP:** ____ **EVALUATION PERIOD:** **ENDED JUNE 30, 2004**

GROUP PRACTICE DEVELOPMENT

Group's involvement in attracting new clients, retaining existing clients, expanding work with existing or former clients. Group's efforts to cross sell other groups or lawyers. Group's collaboration in selling efforts. Group's participation in civic, charitable, community activities to promote goodwill.

Additional Expectations:

DNME	ME	EE

Comments:

GROUP CLIENT SATISFACTION

Positive client feedback pertaining to performance of the group

Additional Expectations:

DNME	ME	EE

Comments:

GROUP PROFESSIONAL DEVELOPMENT

Builds and maintains group's technical skills and reputation. Group demonstrates problem solving skills, creativity and effectiveness. Members of group adhere to ethical rules and standards.

Additional Expectations:

DNME	ME	EE

Comments:

GROUP LEADERSHIP

Builds consensus, develops unity and promotes firm objectives. Leads group in business planning, financial planning, goal setting and visioning.

Additional Expectations:

DNME	ME	EE

Comments:

GROUP PEOPLE DEVELOPMENT

Effectively leads group in recruiting, mentoring, coaching, supervising, training & developing and transitioning principals, associates and staff.

Additional Expectations:

DNME	ME	EE

Comments:

GROUP FIRM COMMITMENT

Group's firm-first orientation, cooperation with group concept, promotion of collegiality, giving freely of personal and professional time to others.

Additional Expectations:

DNME	ME	EE

Comments:

EE – Exceeds Expectations – *Requires Comments*
ME – Meets Expectations – *Comments Encouraged*
DNME – Does Not Meet Expectations – *Requires Comments*

Group Economics

Performance Measure	2004 Eval Yr ($000's)	Firm Avg ($000's)	2005 Expectations
Work Fees per EP	$1,011	$1,053	
Orig Fees per EP	$1,186	$1,053	
Bill Fees per EP	$1,222	$1,053	
Resp Fees per EP	$1,006	$1,053	
Bill Hours per EP	5,173	5,096	
Attorneys	34		
Dist Inc per EP	$390	$360	
Est. Realization	91.9%	91.6%	
Est. Days (*WIP, A/R – Billing Fees*)	134	125	

Comments: ____________________

Setting Expectations

		Meeting Date
Group Leader	____________________	__________
CEO/Mgr. Dir.	____________________	__________

Evaluation

		Meeting Date
Group Leader	____________________	__________
CEO/Mgr. Dir.	____________________	__________

Performance Measures

1. The Performance Measures are intended to help describe performance expectations for principals. They provide support and guidance for the evaluation teams and principals in setting performance expectations and evaluating performance.

2. It is expected that the Performance Measures will further define and promote consistency within, between and among the evaluation teams.

3. The purpose of the prepared lists of Performance Measures is to provide examples. It is not intended that all Performance Measures must be used for each principal. Selection of appropriate Performance Measures on an individual principal basis should reflect (a) key areas for performance improvement (b) opportunities to capitalize on the strengths of the principal and/or (c) areas of potential meaningful impact on the group or Firm. Further, it is expected that evaluation teams or principals may choose to include other relevant measures beyond those listed.

4. The listing of Performance Measures is not intended to convey any priority or weighting.

5. It is understood that the Performance Measures have varying degrees of difficulty in terms of evaluation. Examples and illustrations of specific evidence of performance will assist with the more qualitative measurements.

6. It is expected that the Performance Measures will evolve, and be refined as the process becomes fully integrated into the Firm and the Firm gains experience administering the process.

PRINCIPAL PERFORMANCE MEASURES

Practice Development:

Performance Measure	Measured By
1. Client Retention	• Clients Retained
2. Clients Lost	• Client List
3. Development/Execution of Practice Development Plan (e.g., producing and acting to implement a written plan to develop certain types of business)	• Comprehensiveness of Practice Development Plan • Extent of Achievement of Practice Development Plan
4. Expansion of Work with Existing Clients (e.g. focusing on increasing business in a particular practice area)	• New Fees Generated
5. New Clients Obtained (e.g., focusing on attracting and serving a particular type of client)	• Fees Generated
6. Collaboration in Selling (e.g. organizing or actively participating in a team to attract a new client or increase business with existing clients)	• Specific Evidence or Examples of Participation in Team Selling/Involving Colleagues (e.g. disclosing opportunities)
7. Participation in Civic, Charitable, Community Activities to Promote Goodwill	• Specific Evidence or Examples of Participation in Activities
8. Development of Practice Development/Selling Skills	• Specific Evidence or Examples of Improved Skills

PRINCIPAL PERFORMANCE MEASURES

Client Satisfaction:

Performance Measure	Measured By
▪ Client Feedback	• Written Survey Responses • Responses Based Upon Personal Visits with Clients
▪ Client Referrals	• Extent of Referrals Made by Clients
▪ Client References	• Willingness of Clients to be Utilized as References • Being Sought After by a Challenging and/or Important Client

Until measurement systems are developed (e.g., written surveys, client visits, reference and referral tracking), should rely upon specific evidence of effective client service (e.g., user friendly, responsive, client retention, tending the client, etc.)

PRINCIPAL PERFORMANCE MEASURES

Professional Development:

Performance Measure	**Measured By**
1. Planned and Executed Professional Development Activities	• Specific Evidence of Collaboratively–Developed Activities Addressing Appropriate Areas for Professional Development • Extent of Completion of Professional Development Activities
2. Targeted Level of Expertise/Technical Skills	• Extent of Progress in Developing Expertise/ Technical Skills
3. Reputation	• Feedback from Within the Firm and Outside the Firm
4. Adherence to Ethical Rules and Standards	• Specific Evidence or Examples of Adherence
5. Problem Solving/Analytical Skills, Creativity and Effectiveness	• Specific Evidence or Examples Through Serving Clients (e.g., winning a big case based on a brilliant brief, developing a new cutting edge product that commands high fees, success with legislation, analysis of new area that can be used by others in the Firm, etc.)

PRINCIPAL PERFORMANCE MEASURES

Firm Assignments:

Performance Measure	Measured By
1. Participation in Special Roles, Committee Assignments and Special Projects	• Extent of Personal Contribution • Results of Special Initiatives/Assignments

PRINCIPAL PERFORMANCE MEASURES

Leadership:

Performance Measure	Measured By
1. Participation in Firm, Group and/or Office Visioning, Planning, Goal Setting	• Specific Evidence or Examples of Participation • Extent of Contribution
2. Promoting Firm Objectives	• Specific Evidence or Examples of Promoting Firm Objectives
3. Developing Firm Unity	• Specific Evidence or Examples of Developing Firm Unity
4. Building Consensus	• Specific Evidence or Examples of Building Consensus

PRINCIPAL PERFORMANCE MEASURES

People Development:

Performance Measure	Measured By
1. Participation in Recruiting	• Specific Evidence and Examples of Participation and Extent of Contribution
2. Active Management (e.g., Mentoring, Coaching, Supervising, Evaluating and Training Principals, Associates and Staff)	• Specific Evidence and Examples of Level of Effectiveness • Feedback from Principals, Associates and Staff • Growth/Development of Principals, Associates and Staff (e.g., Involving Associates With Clients) • Effectiveness in Setting Goals and Expectations • Effectiveness in Providing Performance Feedback
3. Inspiring, Challenging and Motivating Principals, Associates and Staff	• Specific Evidence and Examples • Morale of Principals, Associates and Staff

PRINCIPAL PERFORMANCE MEASURES

Firm Commitment:

Performance Measure	Measured By
1. Knowledge and Adherence to Firm Policies and Procedures, and Protocols	• Specific Evidence or Examples of Understanding and Compliance
2. Promotes Collegiality	• Specific Evidence or Examples of Promoting Collegiality
3. Firm-First Orientation	• Specific Evidence or Examples of Firm-First Attitude, Behavior and Actions
4. Supportive and Contributive to Firm Initiatives	• Specific Evidence or Examples of Being Supportive and Contributive
5. Willingness to Give Freely of Personal and Professional Time to Others	• Specific Evidence or Examples of Giving Time to Others
6. Cooperation with Group Concept	• Specific Evidence or Examples of Cooperation (e.g., Participate in Teams to Accomplish Practice Group Objectives)

Joel A. Rose & Associates, Inc.
Management Consultants to Law Offices
1766 Rolling Lane
P.O. Box 162
Cherry Hill, New Jersey 08003
Telephone: (856) 427-0050/Facsimile: (856) 429-0073
Website: www.joelarose.com
E-mail: jrose63827@aol.com

TEN APPROACHES FOR MARKETING AN EMPLOYMENT LAW PRACTICE

by Joel A. Rose

The easiest way to market an employment practice is to cultivate referrals from other lawyers.

An employment lawyer should attempt to market himself or herself so persuasively and cleverly that when most lawyers in your area have an employment-related matter, they will automatically think of that specialist. There are several methods of achieving this objective.

1. Write Extensively

First, do what it takes to communicate that you are the best expert in employment law. Write articles as frequently as you can for your local bar newsletter. Most lawyers who read your articles will realize that you are in a very specialized area and will be apprehensive to answer even the simplest questions in your field. If you can write an article every two or three months, all the better. For example, write periodically for your local chamber of commerce's newsletter. That, in turn, might lead to an invitation to become a monthly legal columnist for other periodicals with wide circulation.

Try to write articles for local newspapers as well. Most periodicals are in great need of writers. The more your name appears in print, the more people will remember you. You should write, write and write - and remember all of the important periodicals' deadlines.

2. Speaking up

The importance of being known as the employment law expert in your jurisdiction cannot be overemphasized. You must make people believe that you are the best employment lawyer by your visibility and energy. Volunteer to serve as a liaison between your bar association and the local press on employment-related matters. You will find that over time local reporters will come to you for quotes on employment law topics.

Volunteer to speak to citizen and community groups and write articles in local newspapers about employment-related topics. Every time you have a significant victory in employment law, write a press release and send it to all of the local papers. Over time there should be enough interest in one of more of your cases to have people notice that you are an expert in employment law.

3. Do-it-yourself seminars

Organize a seminar, optimally with another organization like your local chamber of commerce. Suggest a snappy title such as "50 Ways to Avoid Getting Sued" or "Sex in the Bedroom - not in the Office." Have a local hotel provide you with a free seminar room in exchange for the publicity it will receive sponsoring the seminar. Try to have the hotel or a local bank sponsor a simple breakfast, i.e., hot coffee and croissants for the attendees. Whenever you can, invite a respected authority in your field - but not a competitor - to join you in the talk.

If the attendance is good and the audience participation is enthusiastic, consider convincing the chamber or other business organization that is co-sponsoring the event to make it an annual affair. Always advertise the event in local newspapers, send flyers to your current and prospective clients, and use the local chamber's mailing list to publicize the event.

4. Using Area Newspapers

Provocative employment matters sell newspapers in today's society. Sexual harassment and disability issues are high in reader interest. Send press releases to your local papers discussing the significance of your cases or your entire practice. You never know what a reporter will find interesting.

Once you get an interesting article written about you or your cases, have a printer make a reprint. Send it to your clients, prospective clients and one or two choice mailing lists to publicize why the recipients need you as their employment lawyer. Write letters to the editor about any articles that are employment related.

If you have an article appearing in a journal or are giving a speech out of town, be sure to send out a press release. Local newspapers and other periodicals like to publish success stories about local residents and will usually be happy to print those releases. Also, try to write for those periodicals dealing with contemporary issues that are distributed free of charge.

Continue to spread your name through your writings, speeches, quotations in the press, and accolades. You should aspire, when you are introduced to someone, to have that person say,"Oh, I have heard so much about you" or "I have read so things written by you."

5. Joining Organizations

When joining an organization to promote your practice, there are at least two basic rules to follow:

> *Always join an organization in which you actually have a real interest; and*
>
> *Try to become a leader, not just a member, to achieve the visibility you want.*

Target the client population you are seeking. If you are looking for business referrals from corporate or other business entities, join a national or local association of business owners or a related trade association group.

If you are looking for referrals from other lawyers, run for the executive board of your bar association, or become active in the American Bar Association, etc. If you become an officer in any organization, let the local press know. Obviously, the more organizations you are active in, the more people you get to know and the more the pool of referral sources widens.

Joining an organization populated with other lawyers in the employment field, while it may not be an avenue on which you want to spend a lot of time, is not without advantages. The more lawyers you know, the more potential referral sources you have. Other lawyers practicing employment law will at times have conflicts or other reasons why they cannot retain a case, and the idea is to have that case referred to you. On the other hand, if you have limited time because of conflicts at home, schooling, or family, you may not want to focus much energy in organizations with other lawyers in your specialty.

6. Local lawyer referral list:

Make sure that you are on the local lawyer referral list. Your experience will be that there are few other lawyers who are expert in your field, so many of the bar's lawyer referrals may come to you.

7. Volunteering

Become chummy with your local or state human relations commission. If the city or county in which you practice has a human relations commission and you serve as a panelist for the employment section for several years, you can become fairly close with some of its key investigators and compliance officers. While they cannot refer cases to you, the relationships that you maintain over the years will help you when you have to seek out the individuals for practical advice. Mediating gives you an opportunity to show off your employment law negotiation skills to other lawyers - particularly those representing the respondents - and it also widens your circle of acquaintances. The more people you interact with on a weekly basis, the more referrals will eventually come your way.

8. Advertising in the Yellow Pages

Spend some advertising dollars in the local Yellow Pages. Try to maintain a small boxed ad with your firm's name, advertising your firm's expertise in employment law. The ad need not be very large; many lawyers' ads will be far bigger. You will find, however, that many prospective clients will call the name of a law firm rather than an individual lawyer.

9. Using Office Displays

Your office should reflect the fact that you are an expert in employment law. Therefore, if you have any certificates from human relations commissions, women's commissions, arbitration associations or other materials significant to your field, you should prominently display them as you would any diploma or Phi Beta Kappa certificate. Apart from your assurance that you are an expert in employment law, clients are very appreciative - and very curious - to read things in your office showing that third parties extol your virtues as an employment law expert as well. You can also make handouts of articles that you have written in your office or in the firm's waiting room so that clients may read them.

Your firm should also have a firm brochure. Some employment attorneys have two brochures, one larger brochure that contains information about themselves and a foldout of articles that they have written about their practice. The smaller brochure may be enclosed with bills, newspaper articles of interest to clients and other items that are sent out on a routine or occasional basis.

10. Networking with Other Professionals

There are invariably times when you need outside professionals to help you, your clients and the courts in employment law matters. Other professionals help your cases, but they can also help your practice grow. If you establish a good , steady relationship with a battery of experts, they will probably become a reliable source of referrals.

As an employment lawyer, you will be dealing extensively with medical experts, since they figure prominently in cases relating to disability, sexual harassment, and punitive damages, such as for defamation. The physicians, psychologists, psychiatrists and physical therapists with whom you interact can, if you establish a good working relationship with them, be vital sources of client referrals.

An employment lawyer, of course, uses other experts as well. Certified Public Accountants should give you opinions on the feasibility of issuing tax-free language in employment releases and should review the soundness of corporate records. They, like the medical experts with whom you work, will be in a position to refer cases to you.

About Joel A. Rose

Joel A. Rose is a Certified Management Consultant and President of **Joel A. Rose & Associates, Inc.**, *management consultants to the legal profession.* The firm, national in scope, is headquartered in Cherry Hill, New Jersey.

Mr. Rose received a B.S. from New York University and an M.B.A. from the Wharton Graduate School of Business, University of Pennsylvania. He has 40 years of experience consulting with private law firms, corporate law departments and government agencies. Mr. Rose performs and directs consulting assignments in law firm management and organization, strategic and financial planning, lawyer compensation, the feasibility of mergers and acquisitions and marketing of legal services. He has extensive experience planning and conducting retreats and special expertise resolving problems among and between lawyers. He has been a lecturer for the American Bar Association, the American Lawyer Seminar on Law Firm Management and Leadership, the New York State Bar Association, the Pennsylvania Bar Institute, the Florida Bar Association, the Minnesota Bar Association, the Practice Law Institute, and many other state and local bar associations. He is a member of the advisory board of Law Office Economics and Management and the board of Law Department Management Advisors.

Mr. Rose is a guest columnist on Law Office Management and Economics for the New York Law Journal and has had numerous articles published in the National Law Journal, Washington DC Legal Times, Los Angeles Daily Journal, Legal Management, Law Office Economics and Management, The Practical Lawyer, the Prentice-Hall Manual for Managing the Law Office and other state and local bar association journals. Mr. Rose is a contributing author of the book, Model Partnership Agreements for New York Law Firms, published by the New York State Bar Association and of the monograph The Quality Pursuit, Assuring Standards in the Practice of Law, published by the American Bar Association. Mr. Rose is the coordinator of the **Annual Conference & Workshops on Law Firm Management & Economics**. For five years, Mr. Rose Chaired The Acquisition and Merger Committee and Co-Chaired the Large and Extra-Large Firm Interest Group of the Law Practice Management Section of the American Bar Association. He is a member of the National Panel of the American Arbitration Association, the Economics Section of the New York Bar Association, and an associate member of the American Bar Association. Mr. Rose is a fellow in the College of Law Practice Management and is listed in Who's Who in America.

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- Filing, Indexing and Tickler Systems
- Records Retention and Retrieval of Prior Work Product
- Library

CAREER DEVELOPMENT – PROFESSIONAL STAFFS
- Salaries and Other Compensation
- Methods of Evaluation and Training
- Recruiting Practices
- Progression to Partner/Shareholder

AUTOMATION OF PROCESSES
- Word and Data Processing
- Practice Support
- Telecommunications

RECRUITMENT OF MANAGERIAL PERSONNEL

P.O. Box 162 • 1766 Rolling Lane • Cherry Hill, New Jersey 08003 • (800)381-1645 • (856) 427-0050 • Fax (856) 429-0073