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(marketing)



CANADIAN LEGAL
DIGITAL SURVEY
2016

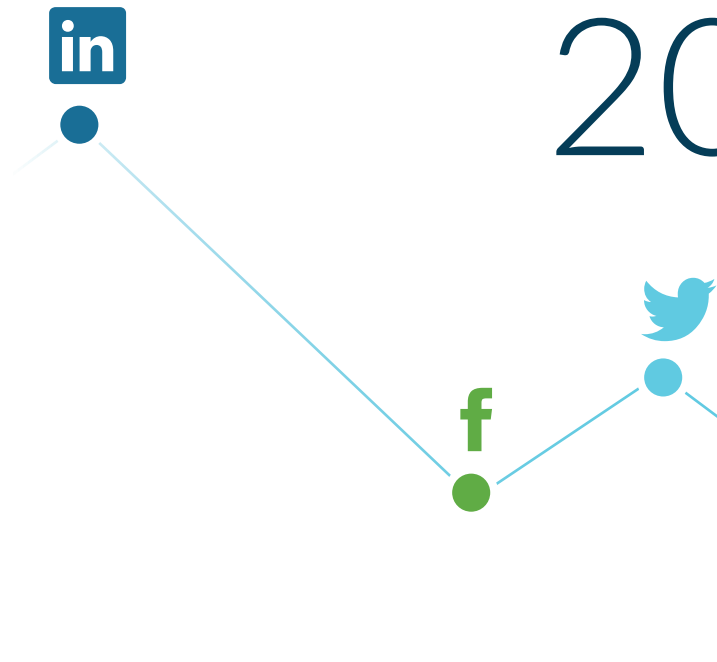
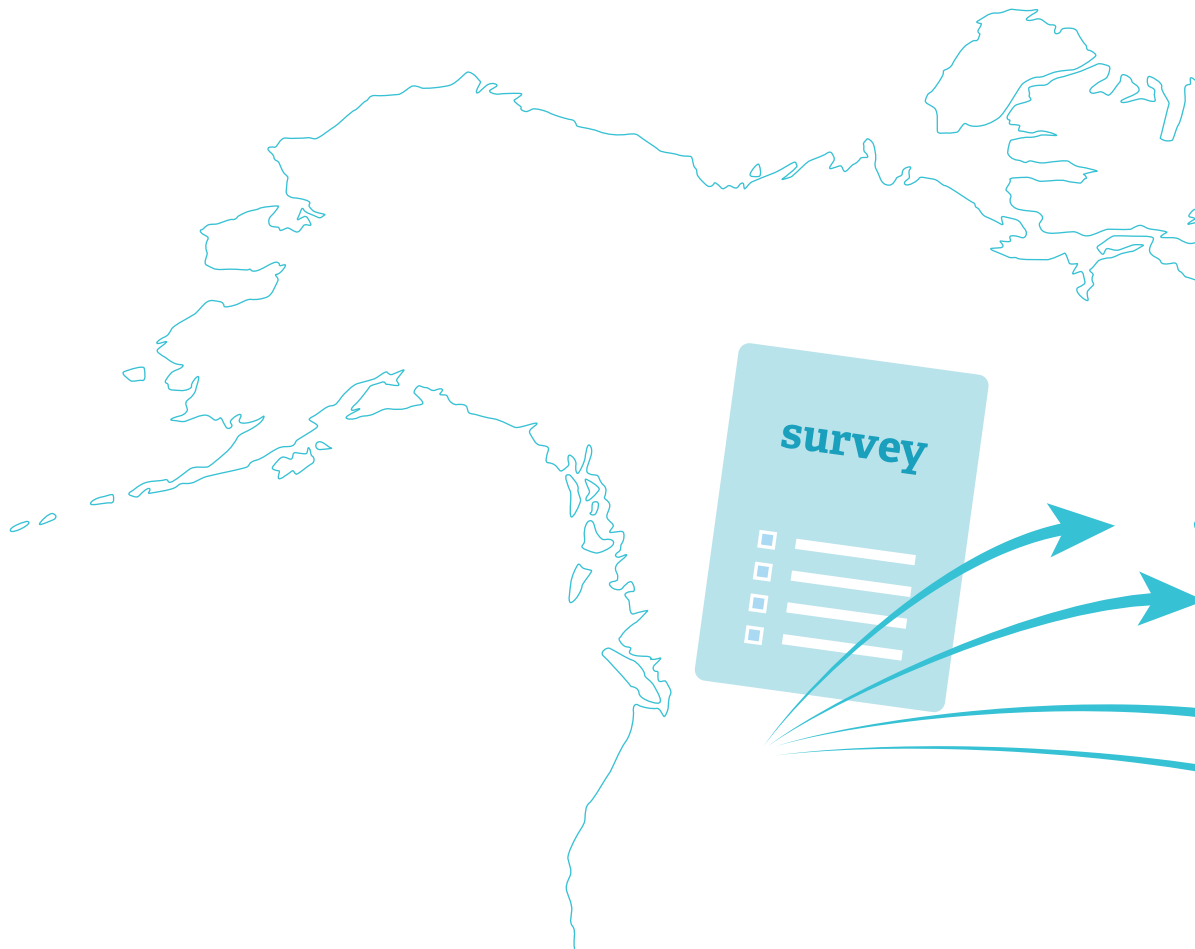


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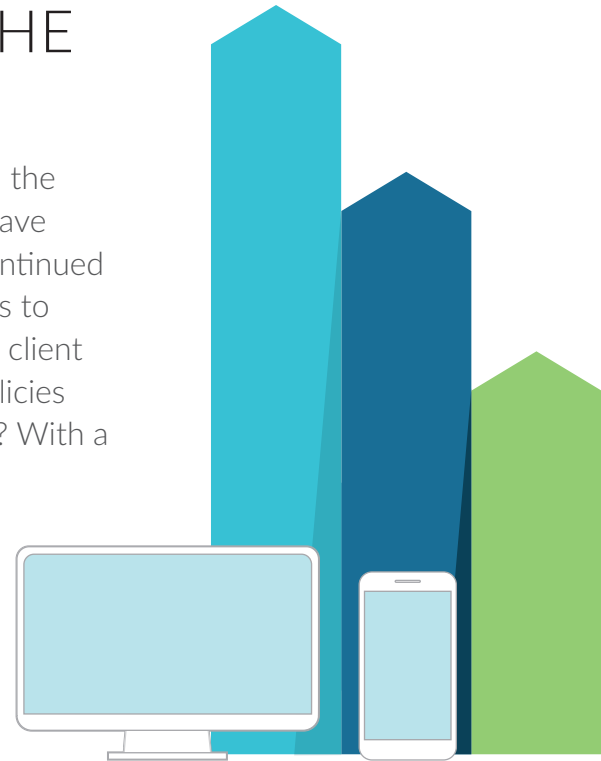
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DIGITAL WILL DOMINATE THE CANADIAN LEGAL MARKET

2016 has seen a continued focus on digital strategy in the Canadian legal market. Legal industry professionals have been late adopters of digital processes. However, the continued disruption in the market has placed pressure on law firms to find new ways to increase brand awareness and to meet client expectations. So how can law firms implement digital policies that improve their bottom line and the client experience? With a thorough understanding of client needs of course!



The 2016 Survey

For the second year in a row, fSquared Marketing has gathered data on the Canadian legal market, to help law firms customize their legal marketing efforts in the realm of digital processes and content strategies. We distributed surveys to three different groups of professionals— in-house counsel, managing partners and chief marketing officers/ senior legal marketers—all to understand the function of digital in their lives.

The surveys were focused on traditional digital interaction, web and social media engagement, content marketing, client feedback programs, electronic billing, client portals, legal process outsourcing, and directories. Due to a low participation rate from managing partners, we have excluded them from this year's report.



The Results Are In

Do legal marketing experts at law firms predict an increased need for online engagement? Are firms benefitting from resources spent on daily, monthly, and annual content marketing implementation? Do lawyers recognize the value of social media and its efficient news and information sharing? The study results show a shift in the way digital is being used in the Canadian legal market, as more in-house counsel and Chief Marketing Officers (CMOs) of large law firms recognize the benefits associated with being plugged in.

Our analysis revealed a few notable trends that have continued from last year's survey:

1. Canadian in-house counsel are consuming legal related information online — and the various new media found there — more frequently than before.
2. Although lawyer bios remain important, content marketing is a vital aspect of lawyer business development, with lawyer-authored articles and speeches, blogging, and social media profiles influencing in-house counsel who are searching for an outside lawyer.
3. Not surprisingly, a recommendation from a trusted source is still the most important factor for in-house counsel who are looking to hire.

A Lawyer's Online Presence is Constantly Under Surveillance

Our survey found that in-house counsel use lawyer bios, lawyer-authored blogs and articles, LinkedIn profiles, and lawyer social media activity to research potential hires. We also discovered that the perceived credibility of these digital sources has increased from last year. In addition, in-house counsel are more frequently using social media to find legal industry information, and to share legal news with in-house and outside counsel colleagues.

The CMOs of large law firms in Canada understand the importance of the digital profile of their firms and lawyers, and as a result have adopted robust digital processes and content marketing strategies. Now more than ever, the Internet is where potential clients go when looking for legal services.



Key Takeaways? Use Digital to Engage

It is evident that law firms and in-house counsel are making an effort to implement digital practices. Yet law firms are not optimizing their digital platforms, nor are we seeing a greater degree of social media engagement. However, more lawyers are signing up for social media, using the internet to stay up to date with legal industry news and information, and using digital methods of collaboration with other lawyers. More lawyers understand how digital can improve their business development efforts by offering insight into client and potential clients' needs.

The legal marketing departments of Canada's largest law firms are supportive (and often leaders) of these endeavors with 78% of CMO's indicating that they anticipate an increase in content marketing next year. It should be noted, however, that only 39% of CMO's anticipated an increase in their digital marketing budget.

The question is: are lawyers using digital efficiently and effectively? 54% of in-house counsel report just using social media to listen, while 10% use it to listen and engage. Social media can be simple to setup, but utilizing it properly can be a challenge. Engaging with audiences involves more than listening to conversations on the web. It entails connecting to relevant discussions and capturing the attention of potential and existing audiences through high-quality content that is interesting, original and tells a story. Lawyers who refuse to make an effort in the digital context are missing out and may soon be left behind.

“Where do I think the greatest value and promise lies in the use of social media? Providing real-time updates and analysis on changes in legal issues.”

– IN-HOUSE COUNSEL



IN-HOUSE COUNSEL SURVEY

In-House Counsel Depend on Digital

Lawyers are among the many professionals relying on the internet for relevant and up-to-date news and information. Notwithstanding any preconceived notion that lawyers prefer to read from dust-covered textbooks, our study shows that 76% of in-house counsel use the internet daily or weekly to find legal industry information. In-house counsel are also building their online presence. Based on our findings, we predict that this will continue to grow.

Bottom-line:

RESPONSIVE, USER-FOCUSED LAW FIRM WEBSITES ARE ESSENTIAL.

The number of people scrolling online through mobile screens has increased dramatically in recent years, with lawyers being no exception. 36% of in-house counsel use smartphones/mobile and 21% use a tablet to consume legal information. Mobile use provides in-house with an efficient source of information, placing great importance on the mobile responsiveness of a law firm's website.

Online Profiles are the New Resumes

When researching outside lawyers and law firms for potential hire, in-house counsel ranked online lawyer profiles even higher this year as compared to last. This begs the question: how much time should lawyers and law firms spend developing their content, voice, tone, and overall strategy for online profiles and social media activity? Our research suggests that the process of promoting your personal brand online is ongoing, and should be revisited regularly.

Update Your Lawyer Bios Regularly

Lawyer bios are the largest driver of traffic to law firm websites. 83% of in-house counsel (up from 78% from last year) ranked lawyer bios as important when researching outside lawyers and law firms for a potential hire. At the very least, lawyers should maintain a well-written and concise biography, which outlines all expertise, education, publications, associations, speaking engagements and community involvement. In a competitive industry, ensuring that all information



is up-to-date provides more opportunity for lawyer bios to stand out. In addition, lawyer LinkedIn profiles have also increased in their importance to in-house counsel looking to hire lawyers and firms — now 37% indicate they influence hiring decisions (up from 24%) over the past year. It is no longer acceptable to not have a LinkedIn profile.

Bottom-line:

IF YOU DON'T HAVE LINKEDIN, YOU DON'T EXIST.



Being a Thought Leader Has Benefits

Content marketing can be time-consuming. However, when done effectively, the benefits of generating high quality articles and other sources can exceed the associated cost. 71% of in-house counsel use articles and speeches written by lawyers to research outside counsel. 46% of in-house counsel use blogs published by lawyers, on topics relevant to their business.

Use Social Media to Show Your Thought Leadership

Up from 17% last year, 22% of in-house counsel report that they use shared lawyer content on social platforms—blogs, LinkedIn, Twitter and Facebook—to research outside counsel. If a lawyer is creating high-quality content, such as articles, speeches, and blog posts, this work will not be seen unless promoted through specific outlets – social media platforms being the primary place to gain traction outside of the law firm website. Lawyers can also show their thought leadership by simply providing opinions and sharing articles from other sources on their social media channels, showing their willingness to keep informed about the latest industry news, and displaying their knowledge of certain topics in that practice area or industry of focus.

Trusted Referrals Remain the Top Hiring Tool for In-House Counsel

100% of in-house counsel said that recommendations from sources they trust are important in helping them research outside lawyers and law firms for potential hire. Not surprisingly, word of mouth is still the most important influencer. Reputation can make or break a decision to hire, and this ultimately relates to client satisfaction.





Client Feedback Programs are Becoming More Important

Client feedback programs allow clients the opportunity to share their input with their law firm about what is working well, and what needs improvement. The increasing importance of client feedback is related to the significance of word of mouth, and trusted referrals in the hiring of outside counsel. This is the second year where 100% of in-house counsel participants have indicated that trusted

referrals are an important tool for hiring potential outside counsel. Can technology make it easier for all lawyers to ask for feedback? Is feedback being used to gain advantage, or is the act of collecting feedback seen as proactive in itself?

85% of in-house counsel stated that they were asked for feedback by at least a few of their outside counsel (up from 76% last year). Of those who participated, 17% were offered an online survey, and 3% have used social media to share feedback. These statistics have remained relatively flat from last year's results (16%, and 0%, respectively).

Although more outside counsel have asked for feedback (and this may possibly be due to the availability of online sources to gather feedback more efficiently) only 66% of in-house counsel feel that their feedback is heard by their outside legal counsel, and if applicable, changes are being made. The bottom line is that no matter how outside counsel choose to gather feedback, it is not enough to simply collect it. It is crucial for firms to have programs in place to analyze the data generated and to provide timely solutions to pressing client needs. At the very least, clients need to be made aware that changes are occurring, and that various alternatives to their concerns are being considered.

In-House Counsel are Scrolling Social Newsfeeds More Frequently for Legal Industry Information

In order to remain thought leaders in their field, in-house counsel need to stay up to date with the latest legal and business news. This year, an increasing number of in-house counsel view LinkedIn and Twitter as credible sources for legal industry news, (mirroring worldwide trends on news consumption). Social media spread news efficiently, allowing users to stay up-to-date simply by checking their phones. 61% of participants rated LinkedIn as credible (up from 49% from last year), and 29% viewed Twitter as a credible source for legal information (up from 20% from last year).



Legal news publications and traditional media remain the most trusted sources of industry news, with 100% and 98% of participants voting for each, respectively.

Bottom-line:

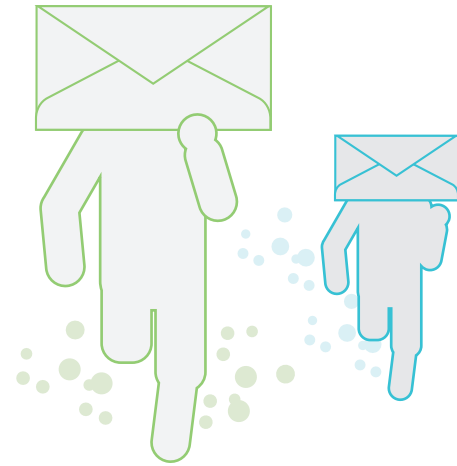


WHEN USED EFFICIENTLY, LINKEDIN AND TWITTER CAN BE A ONE-STOP SHOP FOR RELEVANT LEGAL INDUSTRY NEWS AND INFORMATION.

Following the key influencers in the legal industry, and knowing the top hashtags for news stories and topics that are relevant to your practice, allows lawyers to see industry news on any screen: by simply scrolling through newsfeeds, receiving notifications when influencers have shared content, or by searching for specific information on social media. There are now many simple ways to organize social media so that information is curated to your tastes and interests and is delivered to you in real time, eliminating the need to search online for relevant articles or wait for magazines to arrive in the mail.

Email Is Not Dead

Despite popular belief that email is no longer a preferred consumer method for communication, the legal industry continues to rely heavily on email. Our results reveal that 80% of in-house counsel read newsletters and/or client alerts — those sent by outside legal counsel via email — somewhat often or very often. Overall, 98% of participants think that law firm newsletters/client alerts are credible sources of legal industry, and business information. This is due in part to email being a direct, and often personal, source of information when sent from outside counsel.



Bottom-line:



INCLUDE AN ANALYSIS OF LEGAL CASES, WITH AN EMPHASIS ON THE CHANGES OF LAW, IN NEWSLETTERS AND CLIENT ALERTS.



Social Media Allows for Fast Transfer of Knowledge from Outside Counsel Firms

As a complement to newsletters and client alerts sent via email, social media allows for immediate and easy communication with in-house counsel. 61% of participants accessed content provided by outside counsel firms through new media tools — including Twitter feeds, blogs, Facebook pages, firm-branded mobile applications, LinkedIn newsfeeds, updates and discussion groups.

When asked why they use social media, in-house counsel reported that it provides real-time updates and analysis on changes in legal issues, recent developments in the law, and it allows for collaboration. Expanding the legal discussion to social media broadens the opportunities for lawyers to share their opinions with like-minded individuals.

LinkedIn is the Top Social Networking Tool for In-House Colleagues



Of all of the social networking sites, LinkedIn is used by in-house counsel the most frequently for professional reasons, with 46% of participants saying that they had used it in the past week. We delved a little further and asked in-house counsel how they are using LinkedIn, and the majority (82%, up from 62% from last year) report that they use LinkedIn to connect with in-house colleagues. 57% of in-house counsel use LinkedIn to connect with lawyers in firms they work with (up from 46% from last year).

Unsurprisingly, 64% of in-house counsel stated that they use LinkedIn as a platform to receive news and information. However, 21% (up from 15%) said they use LinkedIn to share news and information. This is an increase in engagement from last year. In order to effectively use the social networking tool, engagement needs to be a priority. Simply viewing, or “listening in” to posts is not enough.

Blogs Are a Business Development Tool

High-quality publications can display thought leadership, benefit law firm SEO when using proper linking strategies, and be repurposed for social media content to attract target audiences and gain new followers. The topics that a lawyer chooses to write about, and how s/he chooses to promote that content, will determine their audience. As 46% of in-house counsel use lawyer-written blogs to research outside counsel, it is important to strategically create blog content that can be promoted effectively.



Important: The timeliness of blogging is an important aspect to consider when strategizing for content creation and promotion. 24% of in-house counsel reported being on a blog for professional reasons within the past week. If blogging every week is unrealistic for your work schedule, repurposing your older articles on social media, as well as sharing articles from other sources that are relevant to your expertise, can help keep users engaged.

Legal Process Outsourcing is Not Standard Procedure

As disruption continues in the legal industry, law firms can find themselves competing with legal process outsourcing (LPO) providers. As such, we included questions on LPO digital engagement in the survey this year.

77% of in-house counsel participant's companies do not engage the services of a legal process outsourcing firm. 51% of in-house counsel are familiar with legal process outsourcing to a great or at least some extent.

Word of mouth influence remains a key influencer in this category, as 80% of in-house counsel reported recommendations from trusted sources as very or somewhat important in helping them to research legal process outsourcing providers. 47% of in-house counsel said that bios on the legal process outsourcing firm's website, as well as articles and speeches written by firm members, are very or somewhat important in helping them to research the right provider. This indicates that for in-house counsel who are familiar with legal process outsourcing, digital may have a significant impact on their hiring decision.



CHIEF MARKETING OFFICER SURVEY

CMOs Recognize the Growing Importance of Content Marketing

Content marketing is a strategic marketing approach focused on creating and distributing valuable and relevant content to attract and retain a defined target audience and ultimately generate profitable client action. Our research suggests that content marketing is on the rise, with 89% of CMO participants either having a current content marketing strategy, or one in the works. 94% of respondents say content marketing is important. Content marketing is known to be growing across all industries, and it appears to be particularly popular within the Canadian legal industry.

39% of respondents say that their marketing department spends 20 or more hours per week on content marketing. We predict that this number will increase — 78% of CMOs anticipate an increase in content marketing in the next year. Although larger law firms are generally the first to implement firm-wide content marketing strategies because of the time and effort involved in its implementation, it is entirely possible for small and mid-sized firms to incorporate strategies tailored to their resources. Even on a smaller scale, content marketing can be effective in spreading brand awareness and creating lasting value on the Internet.

“ We have replaced our news wire services with Twitter. LinkedIn is as essential as lawyer bios. LinkedIn and Facebook re-distribute our content. Facebook is used for our community info. ”

– CHIEF MARKETING OFFICER



Successful Content Marketing Requires Lawyer Participation

Although it is clear that the senior legal marketing experts in law firms across Canada recognize the importance of content marketing, at this time only 33% of firms employ a dedicated content marketing professional. 100% of respondents said that at least 10% of their lawyers participate in providing content for marketing purposes, with 44% saying that 25% to all of their lawyers participate in providing content for marketing purposes. These statistics may reflect the fact that law firm content is directly linked to firm-wide updates, changes, and information regarding the firm's industries of focus, and the key practice areas, of the lawyers at the firm.

Bottom-line:

GET LAWYERS INVOLVED IN CONTENT MARKETING.



Encouraging lawyers to participate in your law firm's content creation can be beneficial, as they are knowledgeable in their fields, and are often well-informed about the latest legal news. That being said, lawyers do not necessarily need to be involved in the planning of content creation, or the distribution and promotion of content on various platforms, such as the firm website and social media. If you are a smaller firm with fewer resources, lawyers may be expected to participate more heavily in the overall content marketing strategy.

Blogs are Essential for Legal Marketing

High quality blog posts are timeless content that can showcase your law firm's thought leadership, and drive traffic to your firm website. 57% of CMO survey participant's law firms publish practice or industry specific blogs each month. 36% of survey respondent's firms publish practice or industry specific blogs each week. Blogging is an essential element of a legal marketing strategy and we are curious to learn how much this will increase next year, as more law firms dedicate resources to their overall content marketing strategy.

Bottom-line:

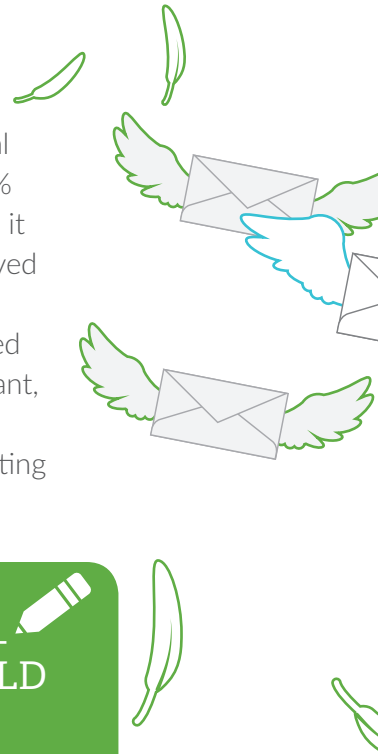
GET BLOGGING.



News and information sources on the latest changes to policies, and updates on legal matters, often contain complex legal jargon that can be misinterpreted or that can deter users from reading in full. Users want a simple post breaking down the key facts in an easy-to-read format. Law firms who use blogging as part of their content marketing strategy must stay up-to-date with the latest industry news, and be able to dissect the crucial elements of a story and write them in plain English for their audiences to read and enjoy. In addition to blogging about current events in the legal industry, law firm blogs should contain thoughts and opinions on topics related to their practice in order to keep clients informed.

Email is Not Dead

Traditional digital interaction is still highly valued within the Canadian legal industry, as 78% of CMO respondent's firms publish client alerts, and 56% publish a firm-wide newsletter for clients. With automated email systems, it has never been more efficient to send information that needs to be received promptly. Although there are many digital methods to reach clients and colleagues, including various social media channels, email remains a trusted and reliable source within the legal industry for the distribution of important, direct information. It should be noted that CASL (Canada's Anti-Spam Legislation) greatly impacted law firm email lists with 55% of CMOs reporting they lost 25-74% of their subscribers through CASL compliance.



Bottom-line:

**DESPITE CASL CONSTRAINTS, LAW FIRMS SHOULD
FOCUS ON E-MAIL MARKETING AS A CONTENT
MARKETING STRATEGY**



Client Portals are Underutilized

Client portals allow documents to be reviewed, and matters of interest to be communicated. Only 50% of legal marketing experts say that their firms offer a client portal, while 89% of respondent's clients, when offered, use the client portals or extranet provided by their firm always, often, or at least some of the time. Client portals are underutilized in the Canadian legal industry.

Bottom-line:

CLIENT PORTALS ARE A WAY TO DIFFERENTIATE.



We asked in-house counsel if their law firm offers a client portal or extranet, and 44% of participants said that their firm does not. Of those who were offered a client portal, 56% would use them.

Client Feedback Programs are Robust

Client feedback is increasingly important as a method of understanding what is working well within the firm and to improve in areas that are lacking. 72% of Chief Marketing Officers who responded have a formal client feedback program in place at their firm. 67% of respondents say that either some or most of their clients are asked for feedback about their firm's services. Client feedback programs create shared value because they show clients that their concerns are being taken seriously. Firms can benefit from receiving feedback to assist key stakeholders with decisions about implementing new policies or changing existing processes.

Firm-Wide Social Media Strategies are Being Implemented

Social media is a priority in the legal marketing strategy of large Canadian law firms. 73% of CMOs report that their firm has a social media strategy in place. 78% of survey respondent's firms have a social media policy that concerns all lawyers and administrative staff. In addition, 78% of respondents say that their firm provides training for social media tools. This tells us that law firms are making an effort to improve their social media presence, and to use it efficiently, as a means for business development and client interaction.

Bottom-line:

YOUR FIRM NEEDS A SOCIAL MEDIA STRATEGY.

Law firms in Canada are becoming savvier when it comes to spreading brand awareness through social media. From creating firm social media accounts, to creating quality content and targeting desired audiences in order to build a following, to maintaining a consistent posting schedule, and getting everyone in your law firm involved in engaging with the firm social media strategy — social media can be very time-consuming, yet effective. Don't let your law firm be one of the few firms who are unable to participate in this growing trend, because it has proven to be a cost-effective way to promote your content marketing and other legal marketing efforts.



DIGITAL IS SHAPING THE CLIENT EXPERIENCE

The right time to implement a superior website and digital strategy was yesterday. More lawyers recognize the value in social media and more law firms rely on content marketing and online digital platforms to attract and retain clients than before. It is clear that the Canadian legal industry is using digital to improve client interaction and day-to-day legal activities. Digital has opened up new channels for client feedback and communication, provides credible sources for information, and when used effectively, can make an impact on decision-making for in-house counsel, and for executives at law firms across Canada.

As outlined in our report, in-house counsel find new media a credible source for information, and certain categories of digital have improved in their perceived credibility since last year's report. Interestingly, the American legal market shows different results as to their preference for, and their opinion on, the credibility of new media and traditional digital tools.

Canadians and Americans are Influenced Differently by Digital

Blogs Have a Greater Influence in Canada

In the United States, the percentage of in-house counsel who read blogs regularly has plateaued since 2014*, as has the percentage of in-house counsel who perceive blogs as the most valuable form of law-firm generated content. Only 38% of respondents said that a high-profile blog would influence them to hire a firm. In contrast, 46% of Canadian in-house counsel respondents report that blogs published by lawyers — on topics relevant to their business — are important in helping them research outside lawyers and law firms. 29% of Canadian in-house counsel value lawyer-written blogs for professional reasons and read them very or somewhat often, while one third of American in-house lawyers aren't reading firm blogs at all.

Online Lawyer Listings are Viewed as More Credible in the United States

20% of American in-house counsel view online lawyer listing services (lawyers.com, findlaw.com, Avvo, etc.) as very credible, while only 5% of Canadian in-house counsel view online lawyer listing services as very credible.

*Based on results from the 2015 State of Digital & Content Marketing Survey conducted in the United States by Greentarget.



Canadian In-House Counsel View Traditional Media as Less Credible than their American Counterparts

71% of American in-house counsel view traditional media (Wall Street Journal, the Economist, etc.) as very credible sources of legal, business and industry news and information, while only 54% of Canadian in-house counsel view traditional media (The Globe and Mail etc.) as very credible.

Social Media Usage Varies among North American In-house Counsel

The legal market in the United States appears to use social media more frequently than Canada. However, their order of preference for social media channels varies. American in-house counsel prioritize their social media channels for professional reasons in the following order: LinkedIn, Facebook, and Twitter. 37% of American in-house counsel have used Facebook within the past week, while only 7% of Canadian in-house counsel have used Facebook for professional reasons within the past week. 24% of American in-house counsel, and 17% of Canadian in-house counsel, have used Twitter within the past week for professional reasons. 68% of American in-house counsel used LinkedIn for professional reasons in the past week, and 46% of Canadian in-house counsel have done the same.

Key Trends in the Canadian Legal Market

Our data collection and analysis on digital use by professionals in the Canadian legal market has enabled us to highlight key trends —from results we've seen for the second consecutive year, as well as new trends to watch.

A Lawyer's Reputation is Everything

The Canadian legal industry may be advancing digitally, but that does not mean that it has abandoned its traditional roots. Unsurprisingly, word of mouth is still the top influencer when in-house counsel are deciding on which outside lawyer or law firm to hire. 100% of in-house counsel participants say that trusted referrals are important when choosing to hire one person or firm over another. This means that client satisfaction is your best indicator of performance and should be an incentive to discover your clients' needs and expectations.



Your Online Footprint is a Key Element of Your Personal Brand

From lawyer-written blogs to social media activity — and especially lawyer bios — your digital footprint is your virtual identity. This footprint can affect the outside perception of your professionalism and expertise. Over the past two years, these digital avenues have become increasingly important to in-house counsel in their law firm research. 83% of in-house counsel (up from 78% from last year) ranked lawyer bios as important when researching outside lawyers and law firms for a potential hire. More in-house counsel are using social media to exchange information with in-house and outside counsel colleagues. For lawyers who wish to be seen as thought leaders, it is a priority not only to be active on social media, but also to increase engagement levels by adding meaningful content.

“Where do I think the greatest value and promise lies in the use of social media? Branding, raising your profile and expertise and as a result, your credibility; one of the ways of verifying candidates in an informal/unofficial way”

– CHIEF MARKETING OFFICER

Gathering Client Feedback is a Priority

Digital has made accessing client feedback easier than ever before. Providing clients with the tools to voice their concerns, or share their general opinions can help your firm avoid unfortunate situations, can save resources on testing new policies, and can aid in the decision-making around processes affecting new clients. 72% of CMO respondents from large law firms in Canada have a formal client feedback program in place at their firm.



Content Marketing is On the Rise

This year, we surveyed senior legal marketers at large Canadian law firms to gain insight on the digital processes at firms that have the resources to implement robust strategies. As suspected, 89% of CMO participants either have a current content marketing strategy, or one in the works. 94% of respondents say content marketing is important, and 78% of CMOs anticipate an increase in content marketing in the next year.

Social media goes hand in hand with content marketing, as it acts as the promotional tool for firm created content. 73% of CMOs report that their firm has a social media strategy in place. 78% of respondent's firms have a formal social media policy, and 78% of respondents indicate that their firm provides training for social media tools. Legal marketing is driving potential leads to law firm websites through social media, blogs, or other content marketing efforts, and this is sculpting the overall client experience.

So what is the final take away from the 2016 Canadian Legal Digital Survey?

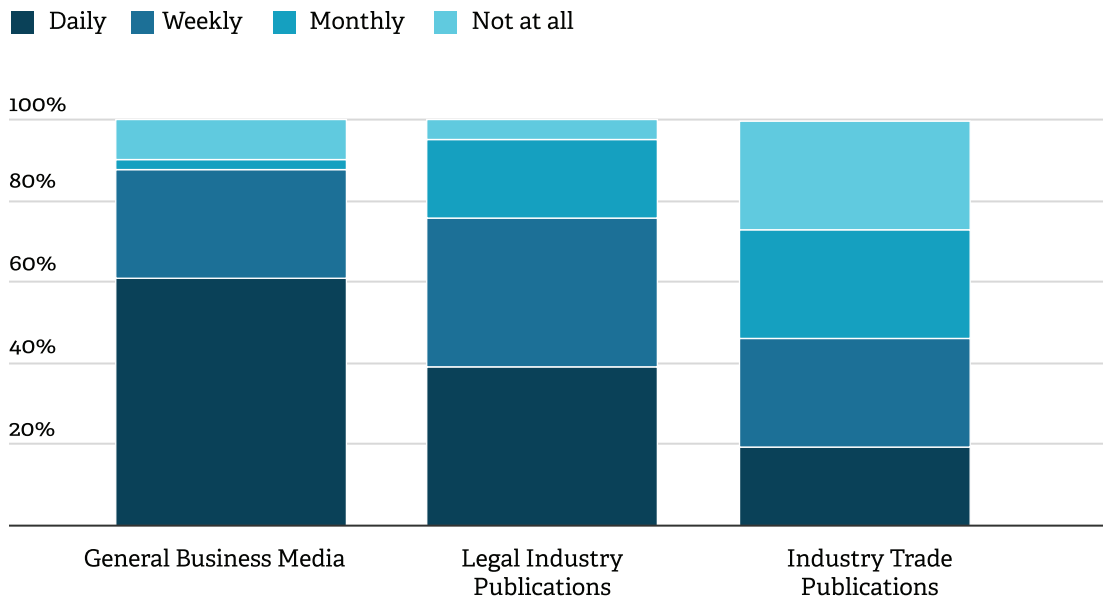
Law firms need to continue to engage their clients in order to understand their needs related both to client service and efficient dissemination of information. Digital tools are not going away and if they are available clients will expect their external counsel to use them.



Web as an Information Source

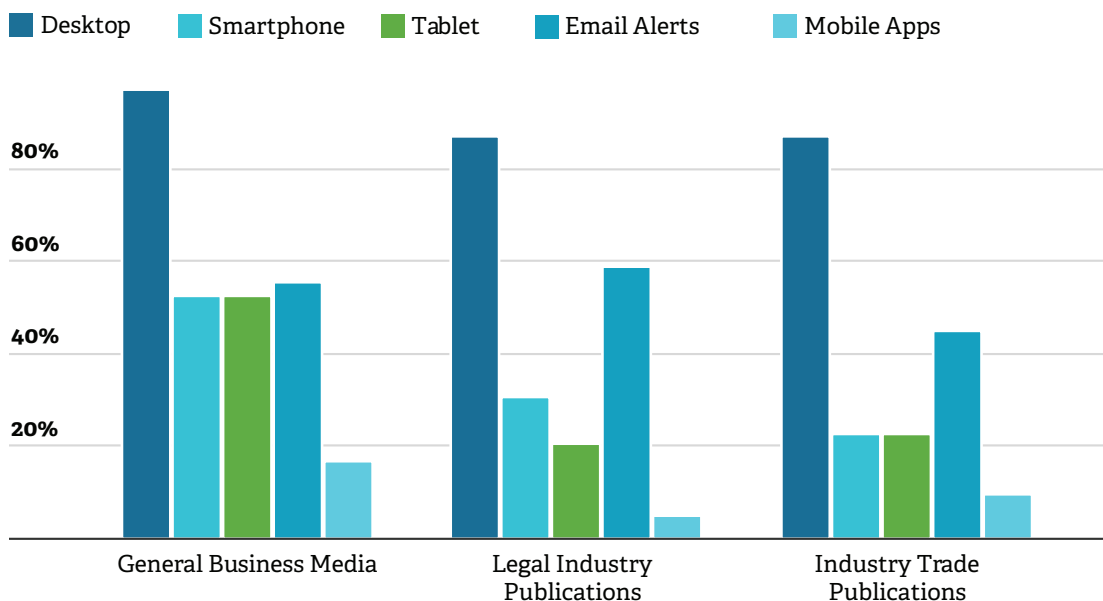
Q:

How frequently do you use the web to consume the following News and Information sources, and through which delivery methods do you consume them?



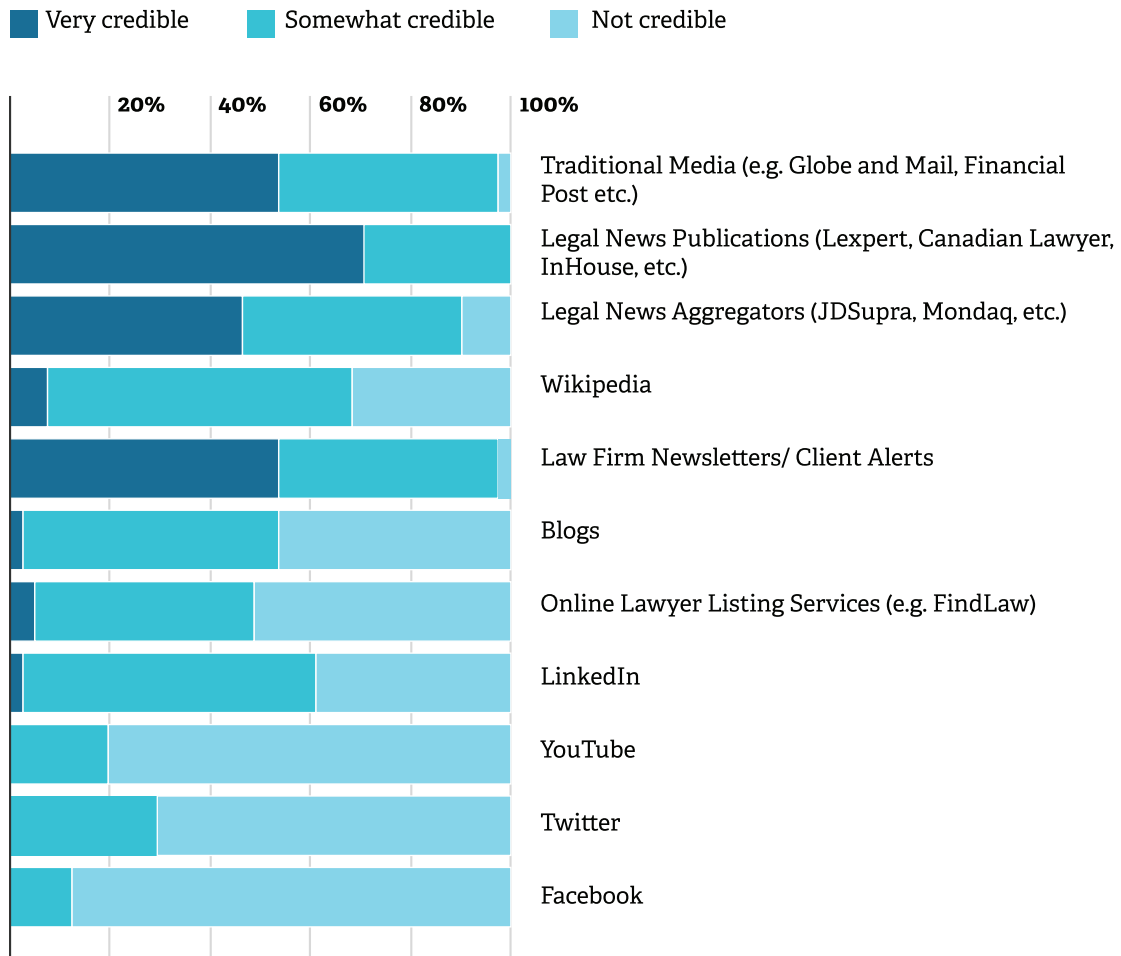
Q:

How frequently do you use the web to consume the following News and Information sources, and through which delivery methods do you consume them?



Q:

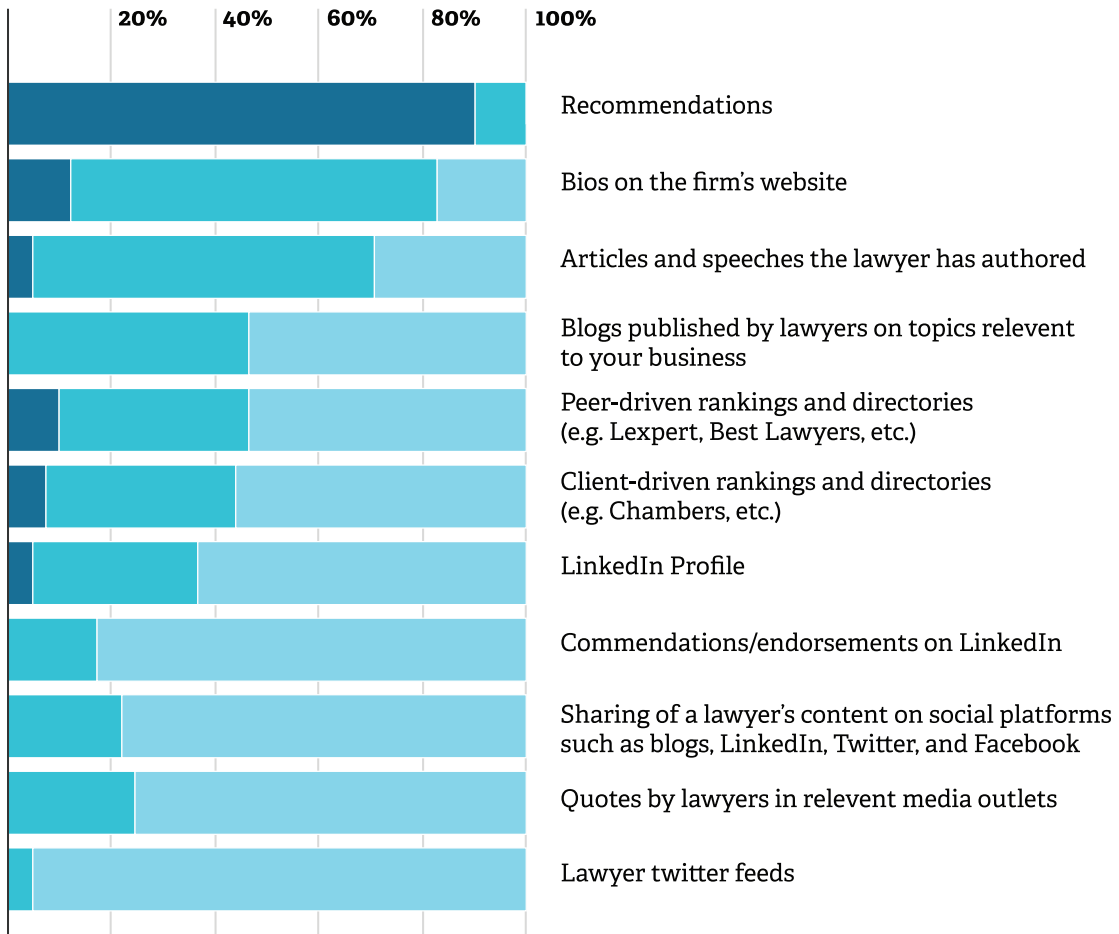
Please rank the following in terms of their credibility as sources of Legal, Business and Industry news and information.



Q:

Please indicate the importance of the following in helping you to research outside lawyers and law firms for potential hire

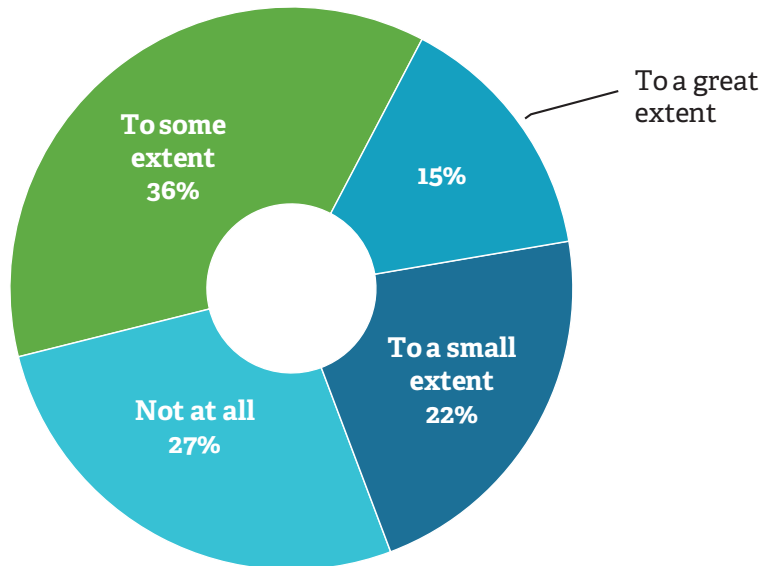
Very Important Somewhat Important Not Important



Legal Process Outsourcing

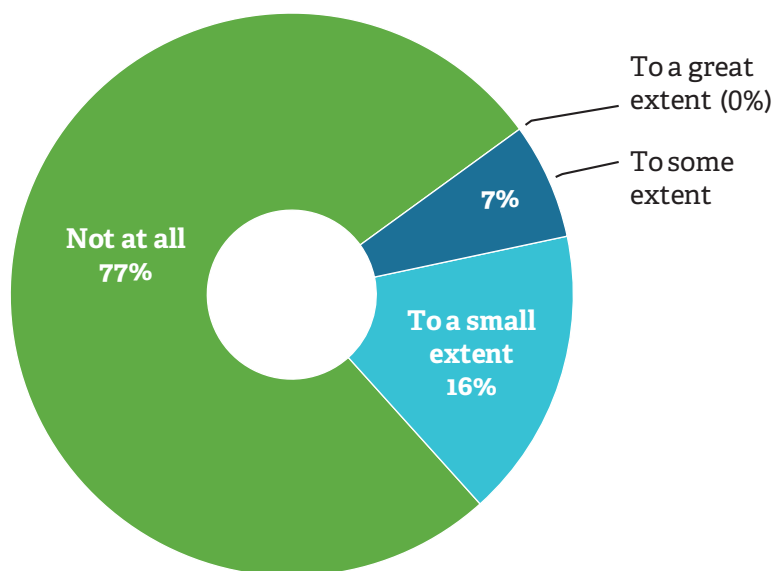
Q:

To what extent are you familiar with Legal Process Outsourcing?



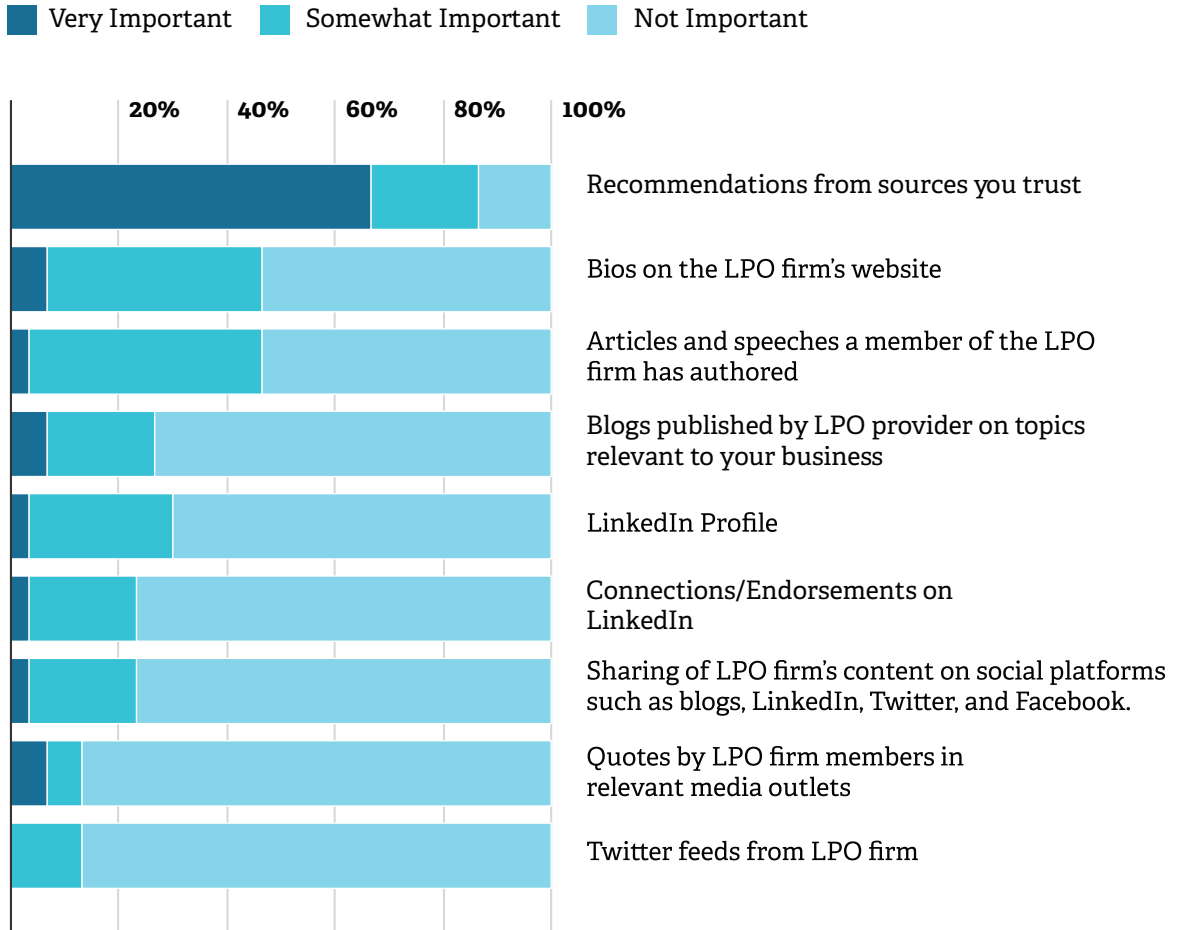
Q:

To what extent are has your company engaged with a Legal Process Outsourcing firm?



Q:

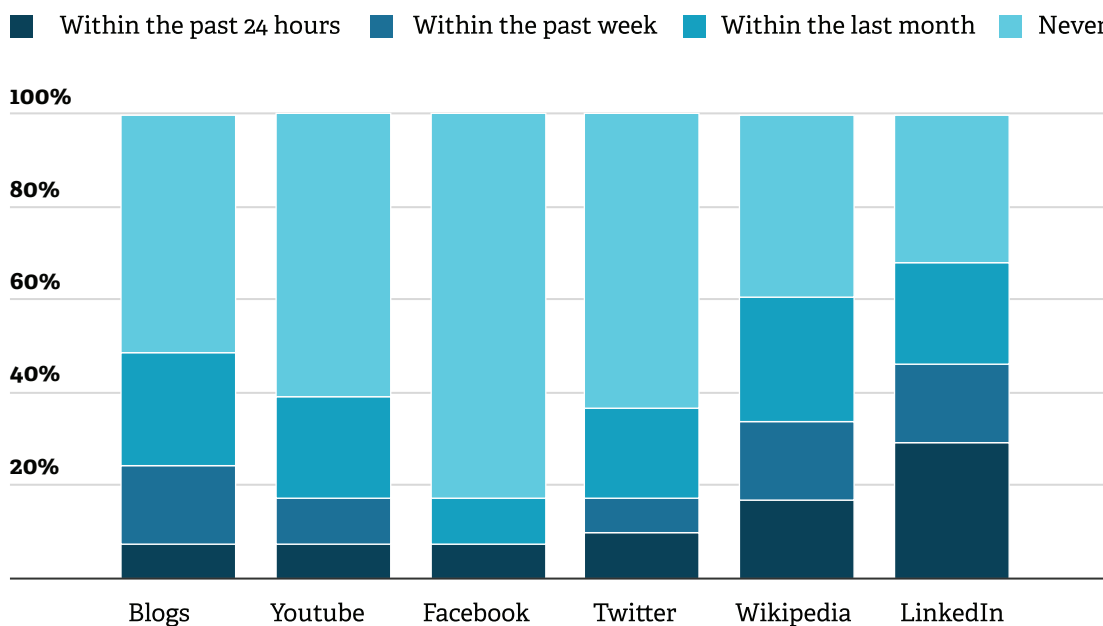
Please indicate the importance of the following in helping you to research potential Legal Process Outsourcing providers.



Social Media

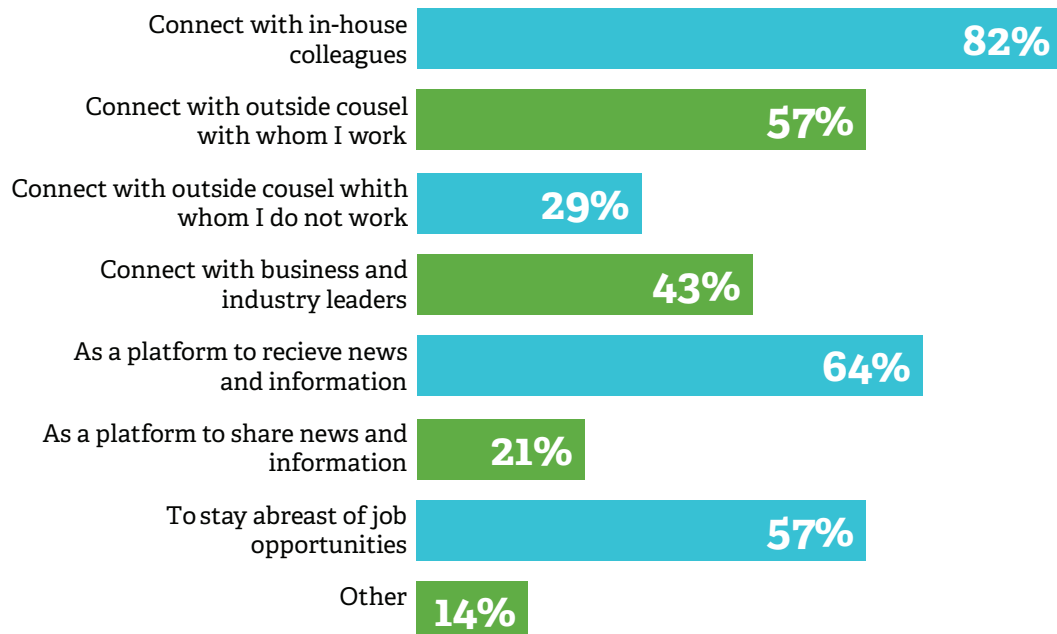
Q:

Please indicate how recently you used the following Social Networking and New Media tools for Professional reasons?



Q:

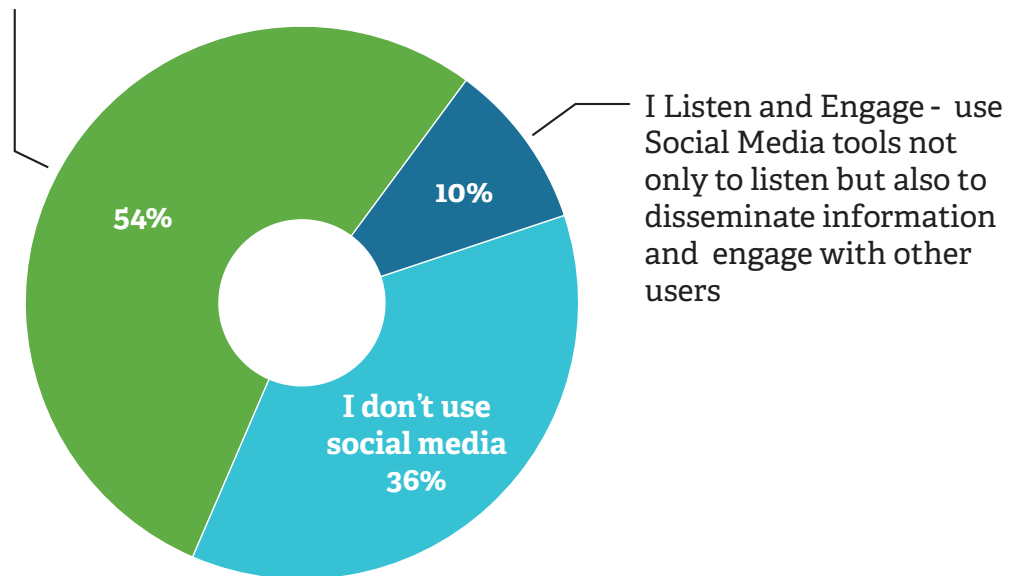
If you are using LinkedIn for Professional reasons, how are you using it?



Q:

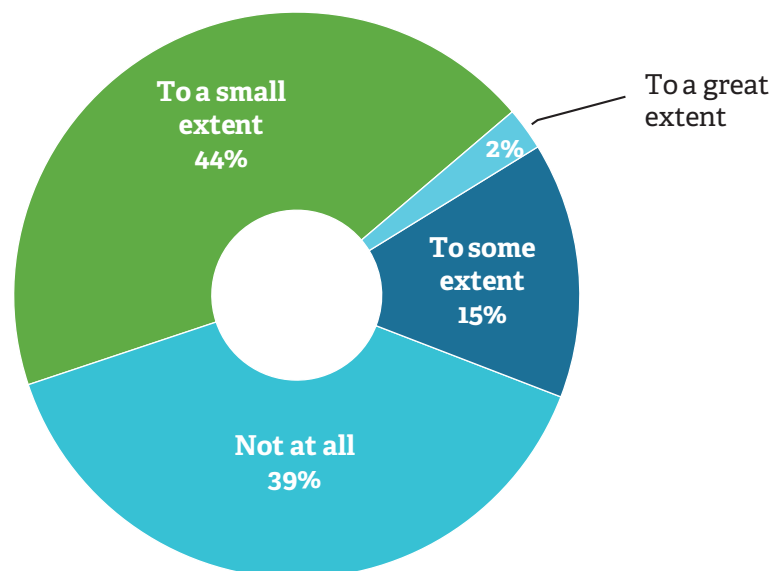
Which of the following best describes the way you use social media today?

I Just Listen – To stay informed of the latest news, developments and conversations occurring on topics that I'm interested in



Q:

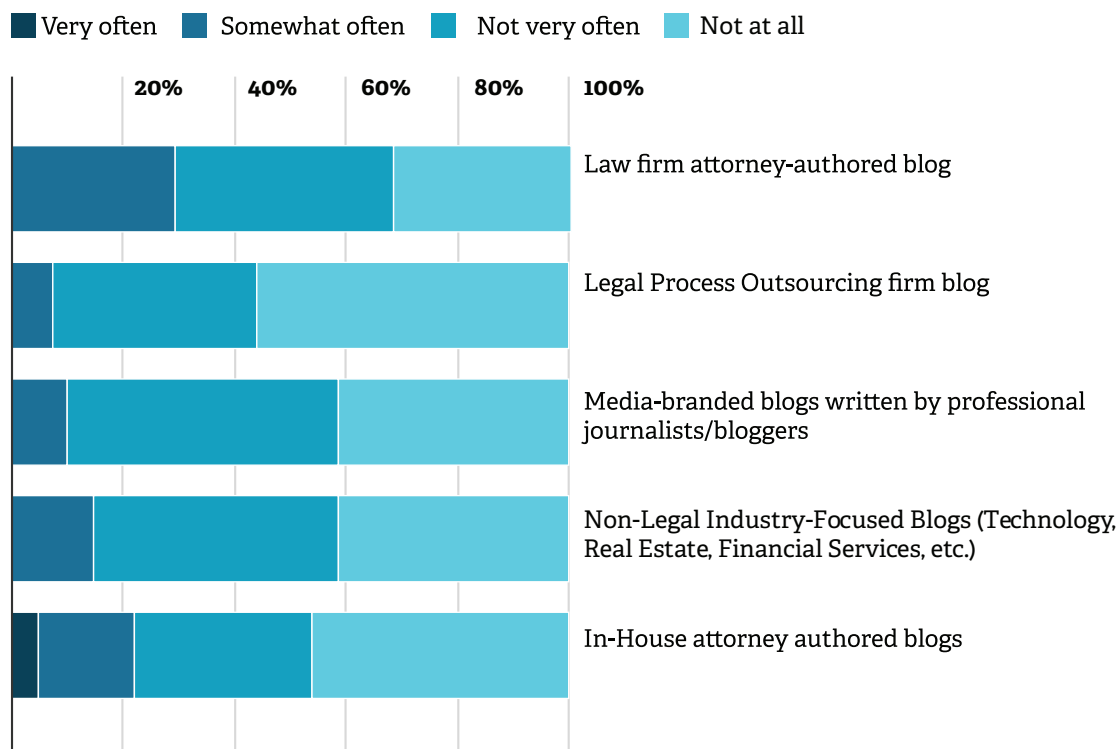
To what extent do you access content from your outside counsel firms provided through new media tools (including Twitter feeds, blogs, Facebook pages, firm-branded mobile applications, LinkedIn newsfeeds, updates and discussion groups, etc.)?



Blogs

Q:

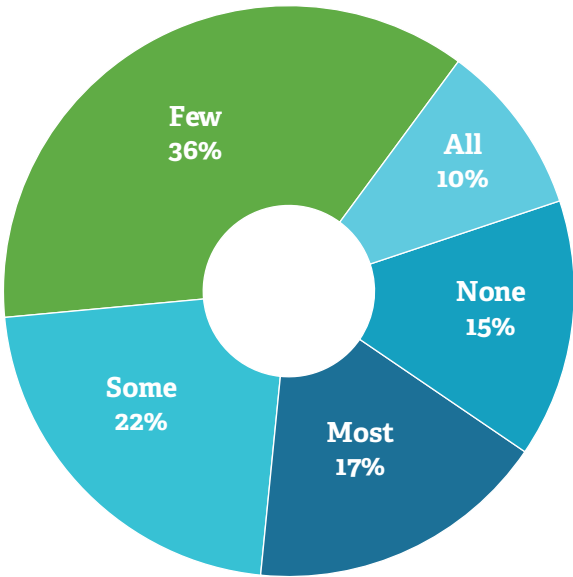
What types of blogs do you read, frequent and value the most for professional reasons?



Client Feedback

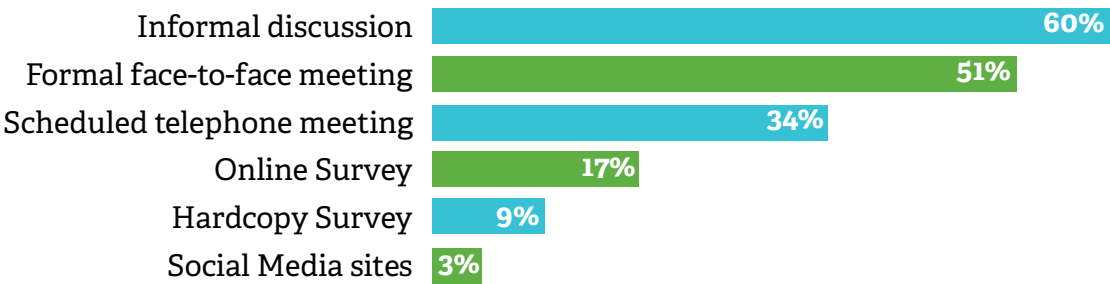
Q:

How many of your outside legal counsel providers ask for your feedback in relation to their services?



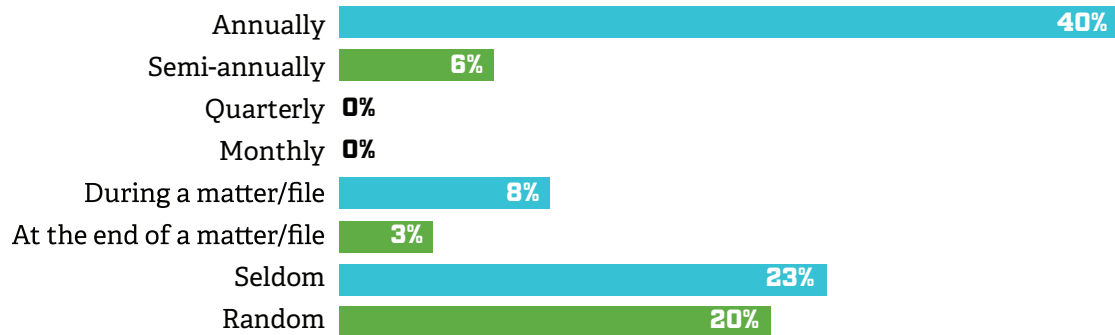
Q:

If offered, by what means does your outside legal counsel gather your feedback?



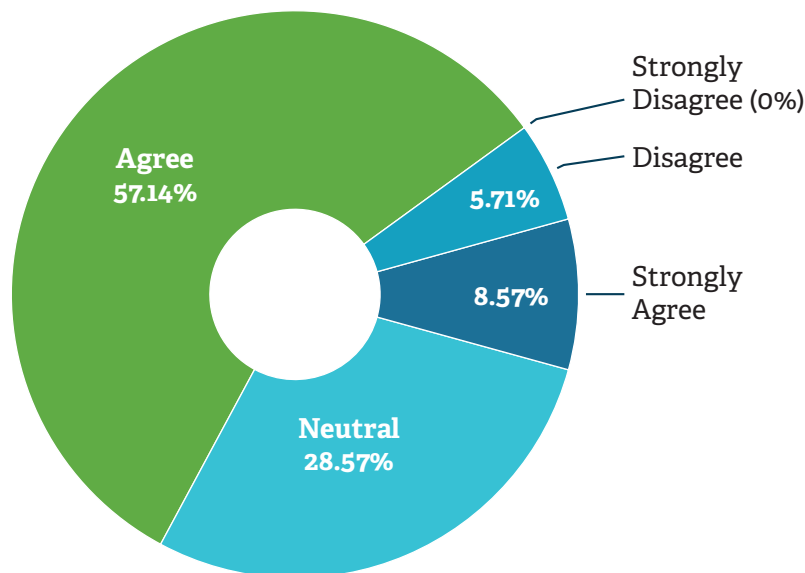
Q:

In general, when does your outside legal counsel request feedback?



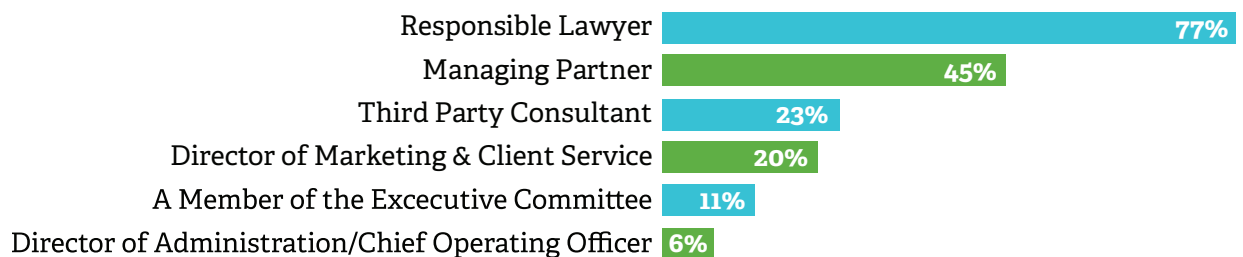
Q:

I feel that my feedback is heard by my outside legal counsel and, if applicable, changes are made?



Q:

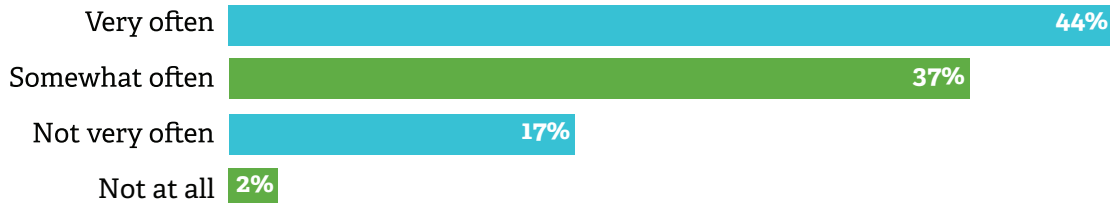
Which members of your outside legal counsel team gathers feedback from you?



Email

Q:

To what extent do you read emailed newsletters and/or client alerts sent by your outside legal counsel?



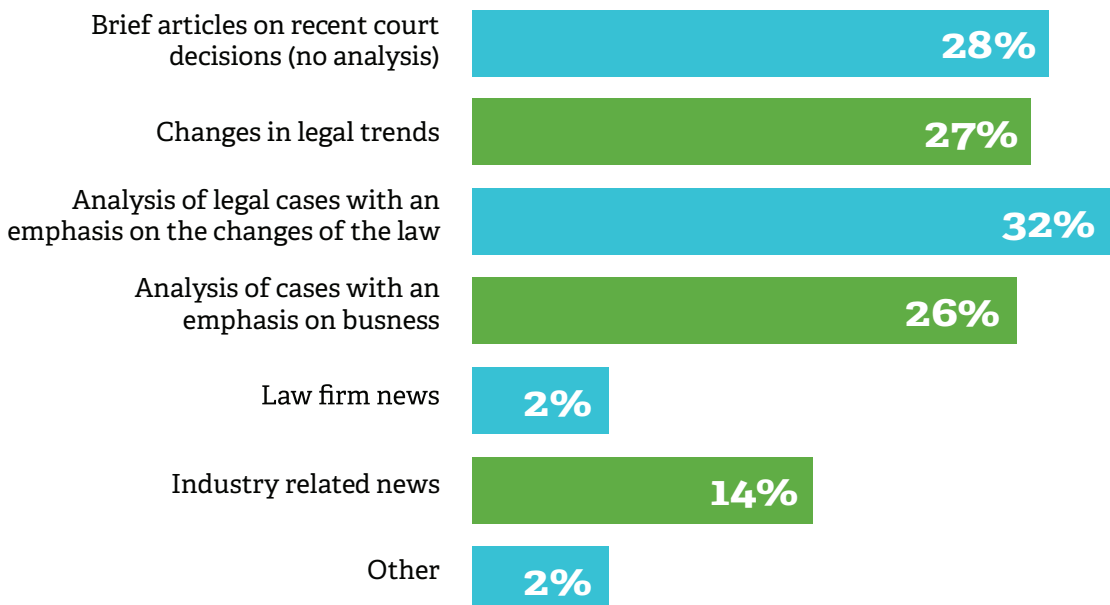
Q:

In general, do you receive the right amount of emailed newsletters and/or client alerts from your outside legal counsel?



Q:

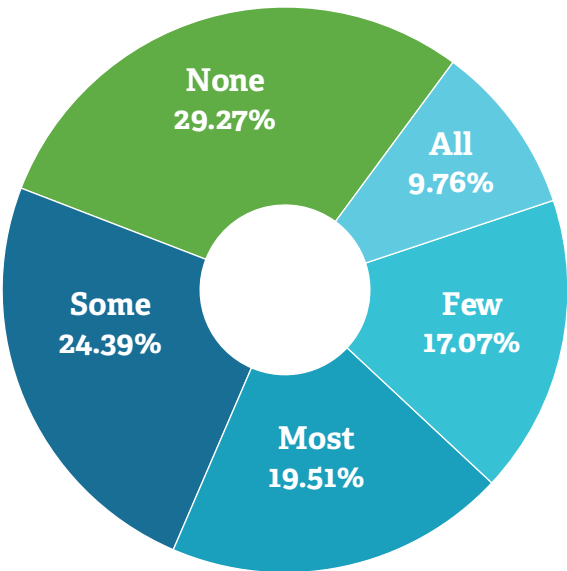
What type of information would you like to receive from your outside legal counsel by way of emailed newsletters and/or client alerts?



Billing

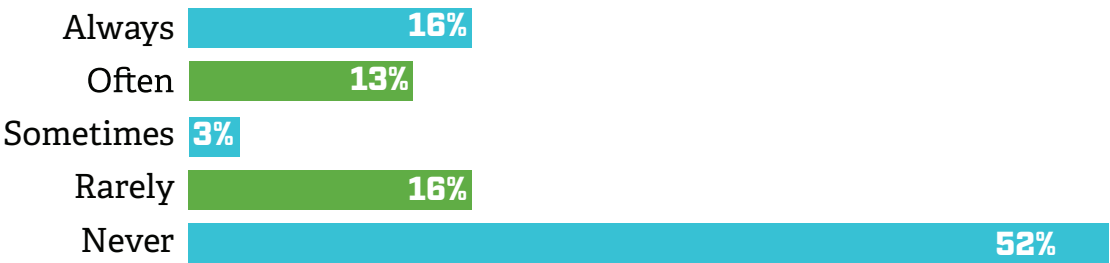
Q:

How many of your outside legal counsel providers offer electronic billing?



Q:

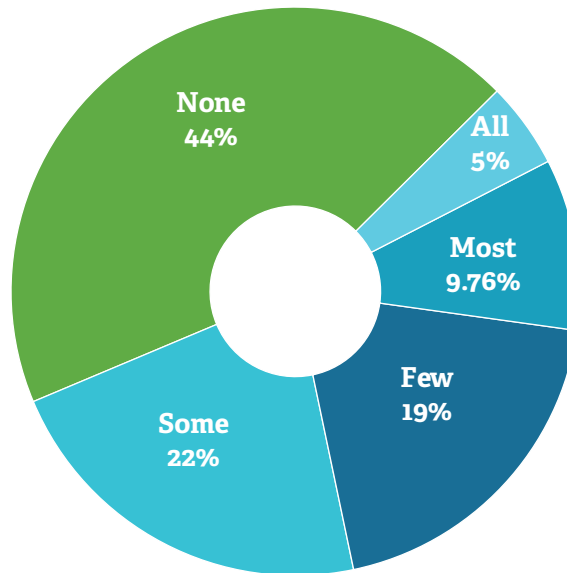
To what extent do you use electronic billing provided by your outside legal counsel?



Client Portal or Extranet

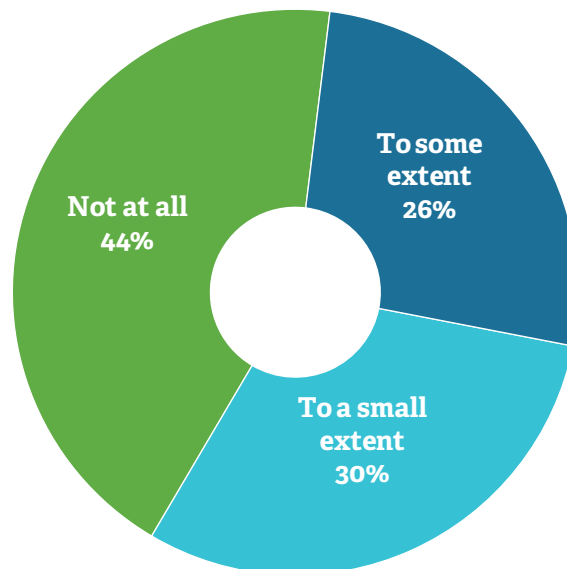
Q:

How many of your outside legal counsel providers offer a client portal or extranet for reviewing documentation and communicating?



Q:

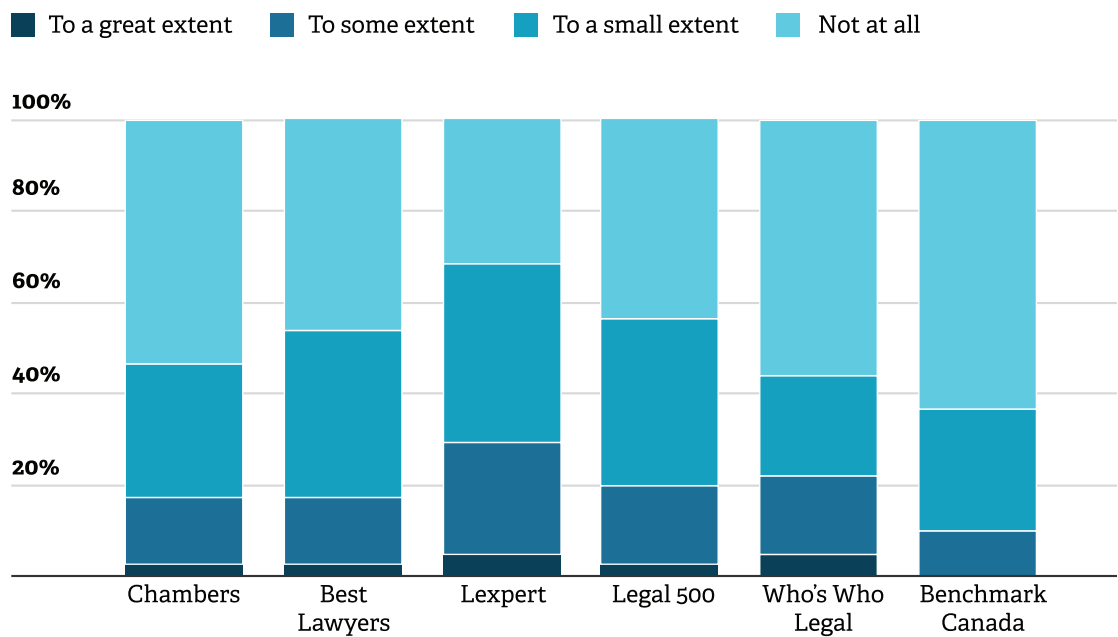
To what extent do you use a client portal or extranet provided by your outside legal counsel for reviewing documentation and communicating?



Legal Directories

Q:

To what extent do the following Legal Industry Ranking Services shape your opinions about, and influence your decision to retain, outside counsel?



Verbatim Responses

We asked in-house respondents the following open-ended questions. Below is a sample of their responses.

Q:

Please describe the extent to which you use and participate in Social Media.

- “ I don't participate or contribute. I just monitor and listen.
- “ Contacts on LinkedIn. Post articles of interest and read those posted by my contacts.
- “ Regular tweets and LinkedIn posts.
- “ I read blogs and LinkedIn postings as well as e-blasts from the CBA/CCCA on topics of interest. Most social media sites are blocked by our employer.
- “ Hardly at all.
- “ I read a very limited selection of posts on sites.
- “ I observe.
- “ Not at all.
- “ Not very much. I go to related sites: women in law, stepping up. I prefer the traditional material (laws, regulations, newsletters, associations, etc.) for the real work.
- “ Access Twitter daily and follow top tier legal providers
- “ I read things that are useful to me.
- “ I don't. I find it distracting and uninformative.
- “ Some
- “ I only use it for research purposes
- “ Rarely
- “ I just read. I do not post.
- “ I use social media all the time personally and professionally. I use ACC's Lexology the most often to get Info and new counsel
- “ I mostly use them to receive information and be in touch with the industry.
- “ I do not have time to use or participate in Social Media. Too much small talk, too little content. When I read something I need a minimum of valuable and thoughtful substance.
- “ I do not use social media regularly for business use; sometimes I use LinkedIn to seek out violators of the statute requiring professional licensure. I function in a fairly small legal market and know the players within my field of practice in Saskatchewan, so have little need to use social media to identify legal counsel. I do appreciate, however, some of the newsletters and blogs available from Saskatchewan-based lawyers and firms and lawyers and firms outside of Saskatchewan.
- “ Only use LinkedIn.
- “ Not at all. I'm a dinosaur.
- “ I don't use social media.
- “ I just review material on LinkedIn and on AML
- “ I do not use or participate in social media
- “ Very little
- “ Listen only
- “ Very little if at all
- “ Publish articles on areas where I seek to be recognized as an industry leader.



Q:

Where do you think the greatest value and promise lies in the use of social media?

- “ Providing real time updates and analysis on changes in legal issues.
- “ Value: information, personal branding. Lies: Just another channel of communication, not a better one. Lots of fluff.
- “ Up to the minute legal news, greater discussion of innovations
- “ If it's used for genuine communication as opposed to spamming users with advertising content, it can be very helpful, and can be used as a means for people in remote locations to remain connected to the rest of their profession.
- “ Don't know, don't care.
- “ Instantaneous communication.
- “ Tailored social media.
- “ Depends on the source: goes from very credible to urban legends.
- “ Sharing of experience; quick hits.
- “ Not sure.
- “ Updating recent developments in the law.
- “ Speed of transmission of information.
- “ Provides an efficient means to disseminate information to a large and interested audience.
- “ Not for me...I don't have time.
- “ Not sure...I have that same questions for the use of social media by our professional regulatory entity. To date, we do not communicate with our members and the public through social media. Call me old, or old school, but I have concerns about losing control over the messaging coming from our organization, and the time and effort required to monitor and participate in social media as a communications tool for what we do.
- “ Speed of information access.
- “ None. It's a distraction. When I need information, I seek it out, I don't have it foisted on me.
- “ As an investigative tool.
- “ Collaboration.
- “ Very little for my practice.
- “ Personal branding.



Demographics: In-House Counsel

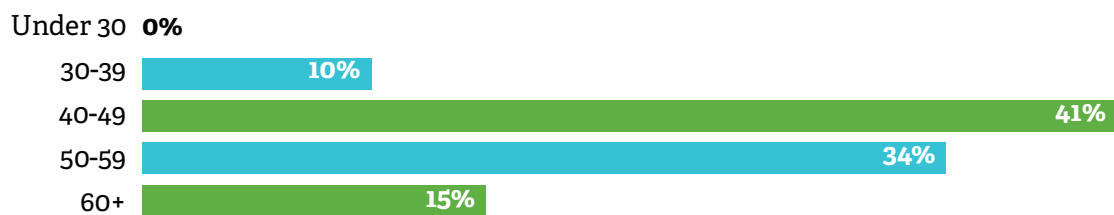
Q:

What best describes your job title?



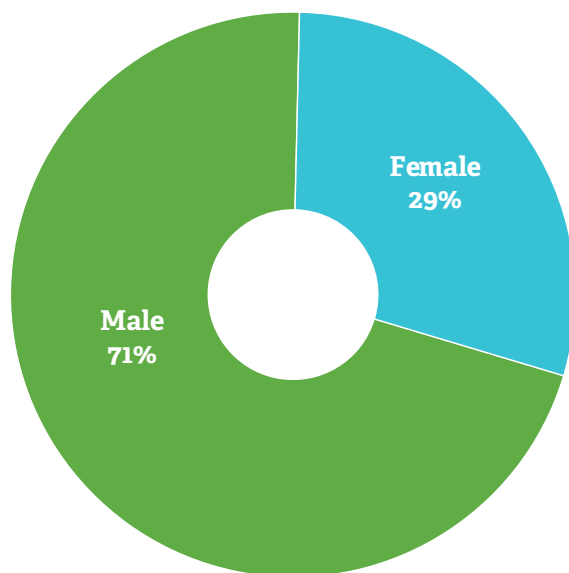
Q:

What is your age?



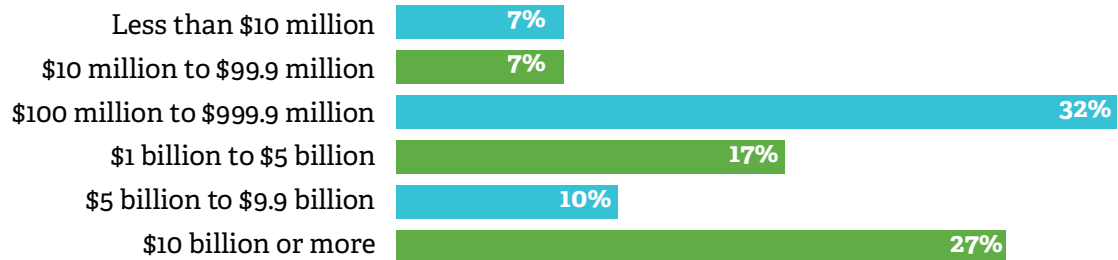
Q:

What is your gender?



Q:

What were the FY 2014 Revenues of your company?



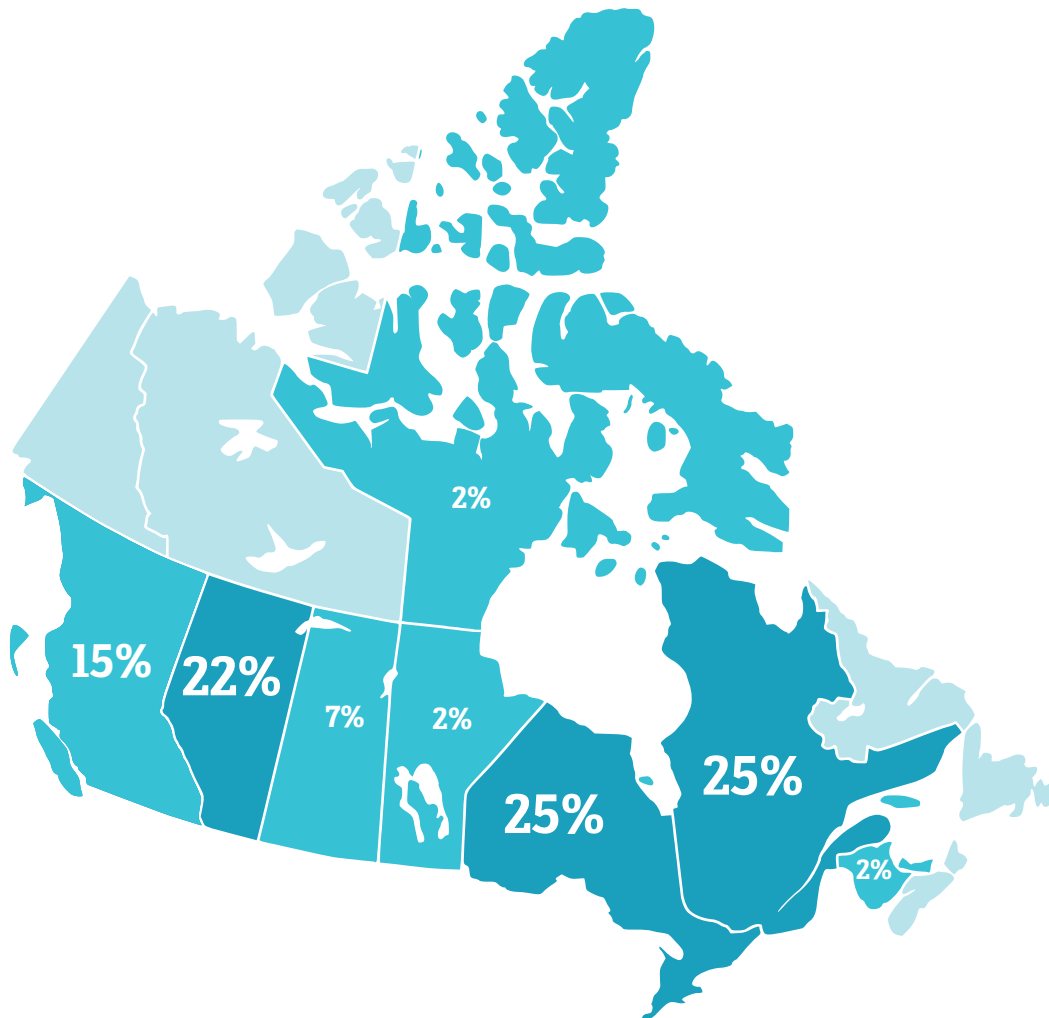
Q:

How many people does your company employ?



Q:

In which province or territory are you located?

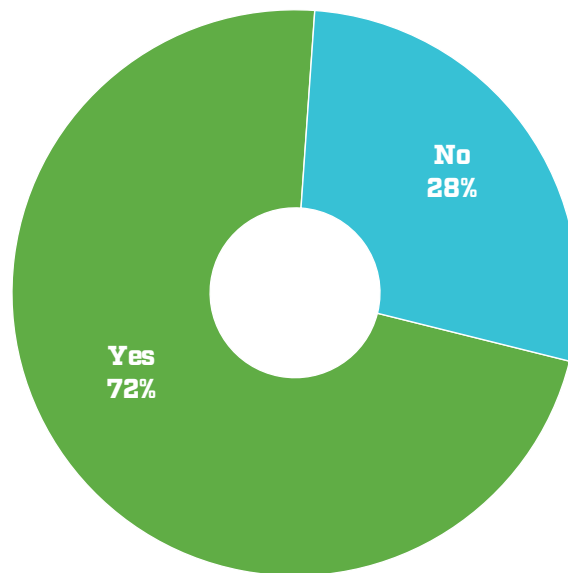




Client Relationship Management

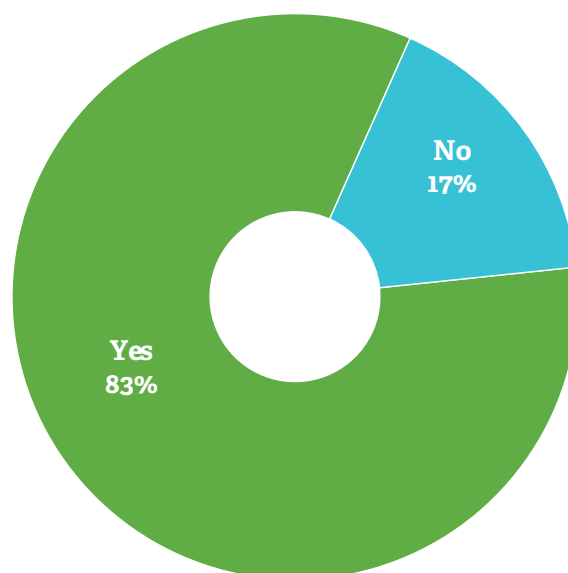
Q:

Does your firm have a formal client feedback program in place?



Q:

Does your firm conduct feedback interviews with clients?



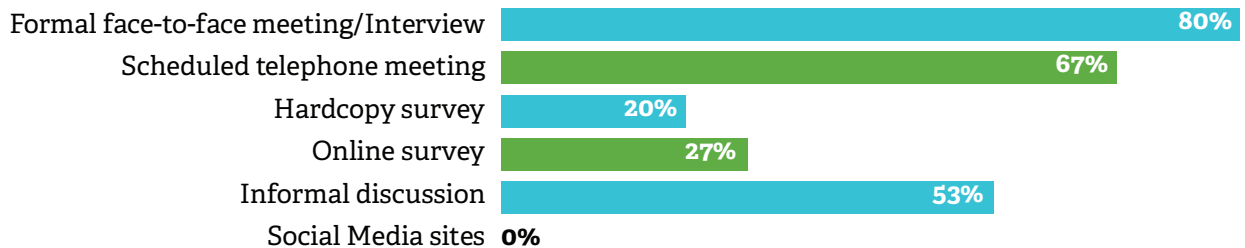
Q:

From how many of your clients does your firm ask for feedback in relation to your services?



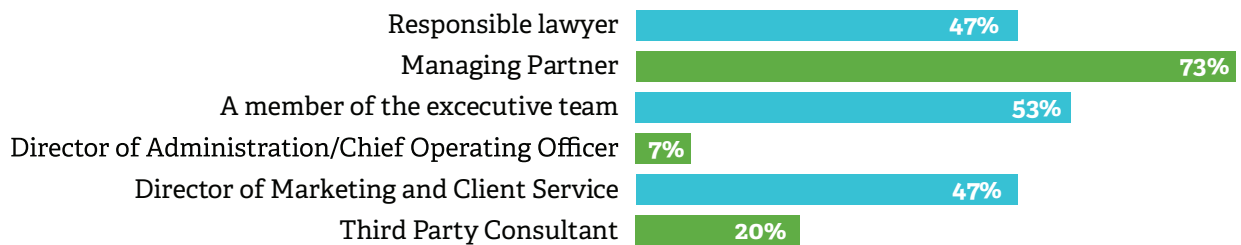
Q:

If offered, by what means do you gather client feedback?



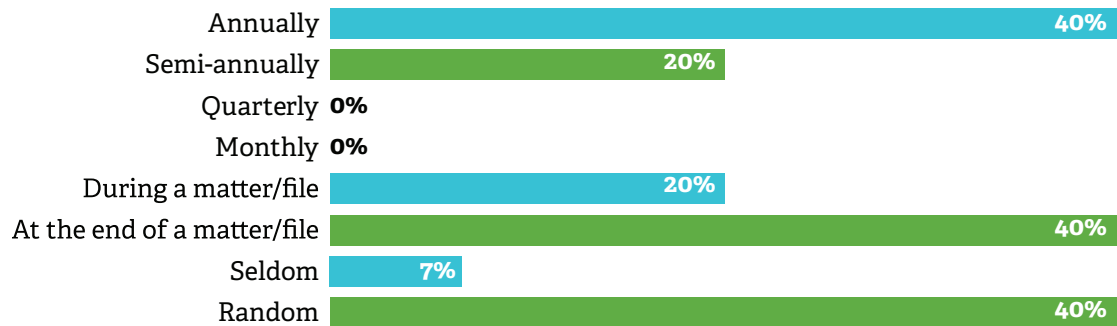
Q:

If offered, who gathers the feedback from your clients?



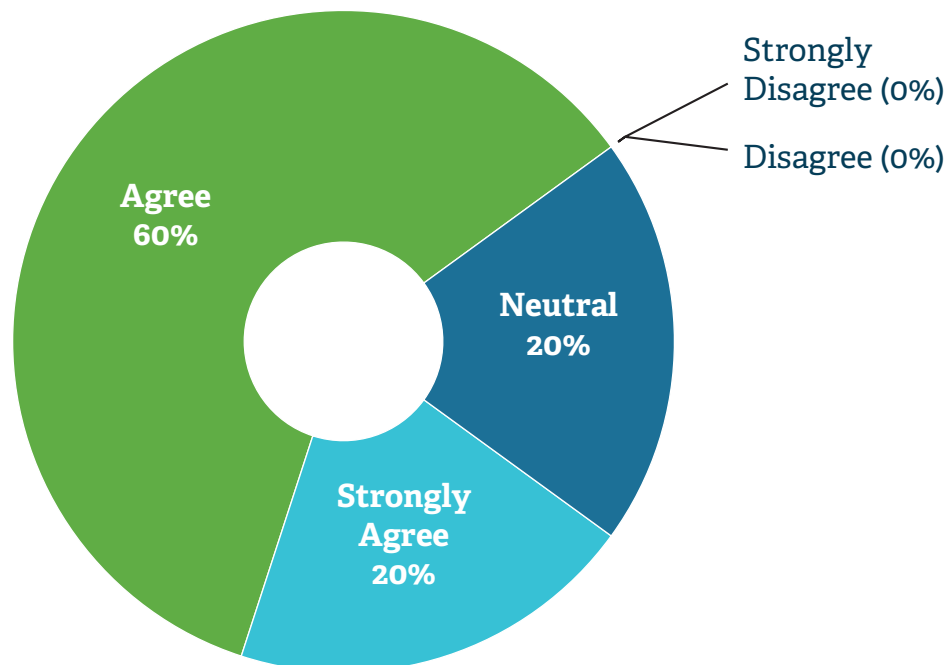
Q:

In general, when do you ask your clients for feedback?



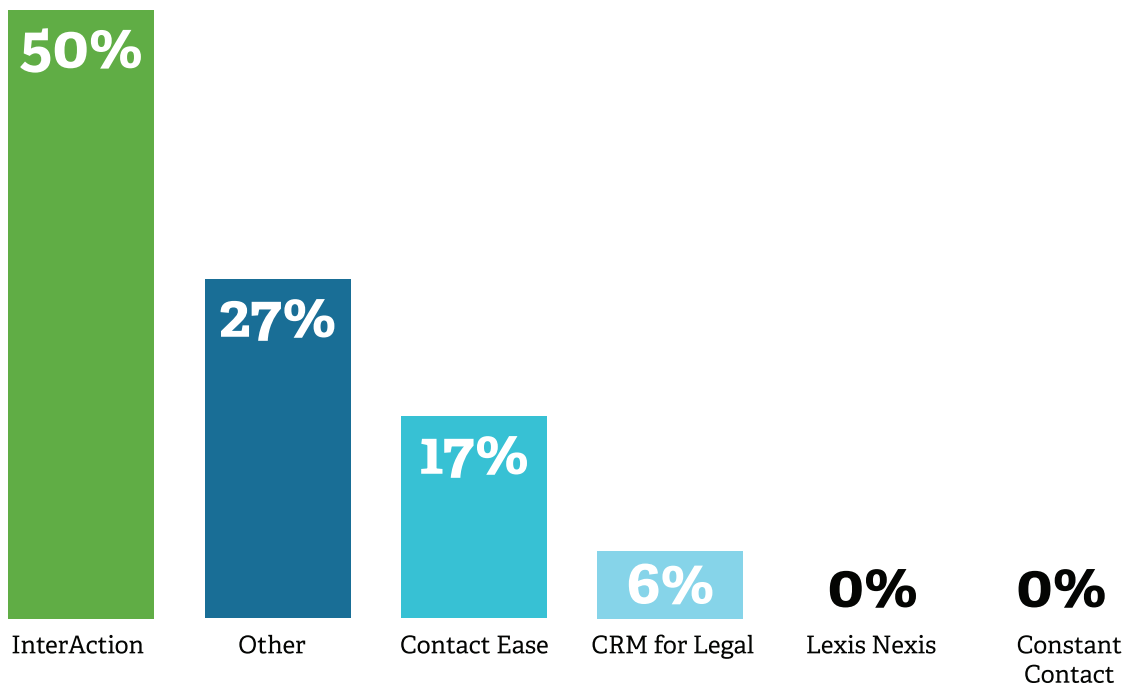
Q:

I feel that our clients feedback is heard by my firm and, if applicable, changes are made?



Q:

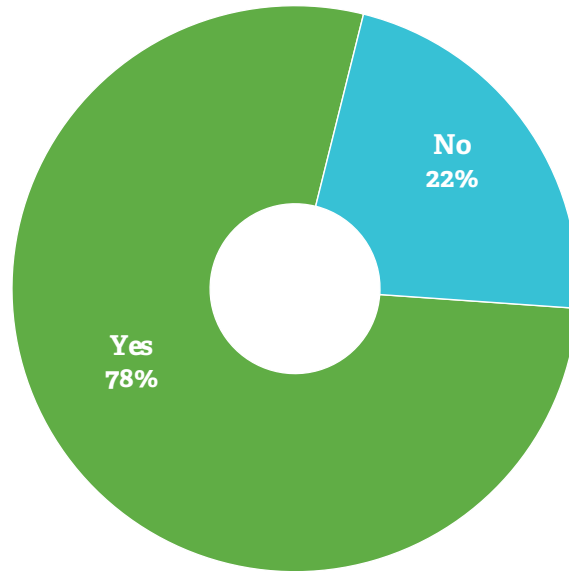
Which CRM (Client Relationship Management) system does your firm use?



Social Media

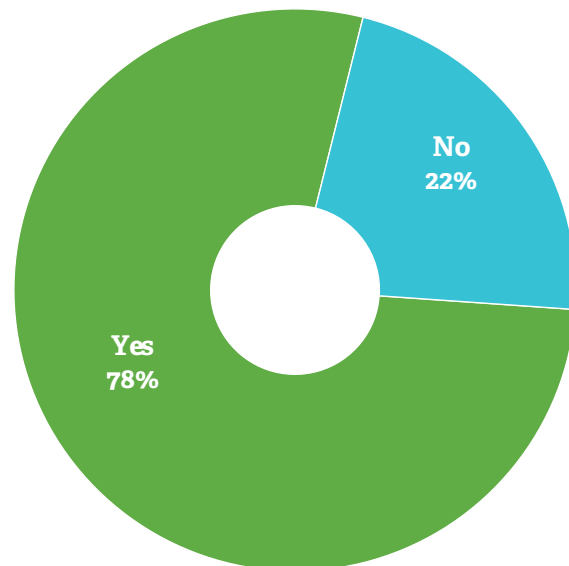
Q:

Does your firm have a Social Media policy?



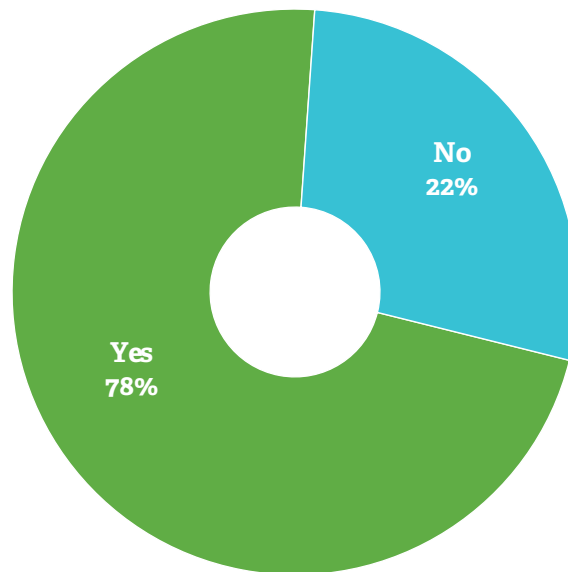
Q:

Does your firm provide training for Social Media tools (LinkedIn, Twitter, etc.)?



Q:

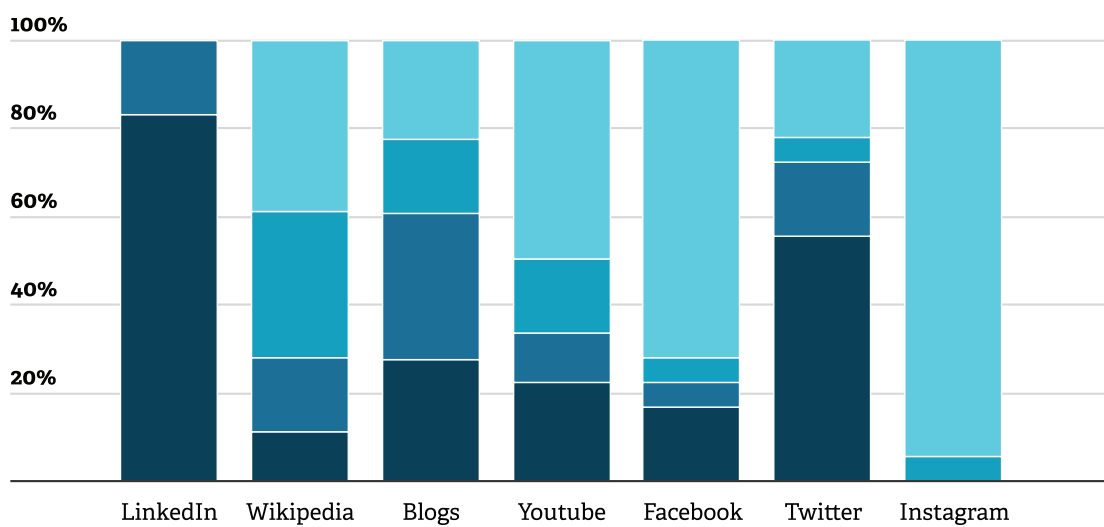
Does your firm have a strategy in place for Social Media (LinkedIn, Twitter, etc.)?



Q:

Please indicate how recently you used the following Social Networking and New Media tools for Professional reasons?

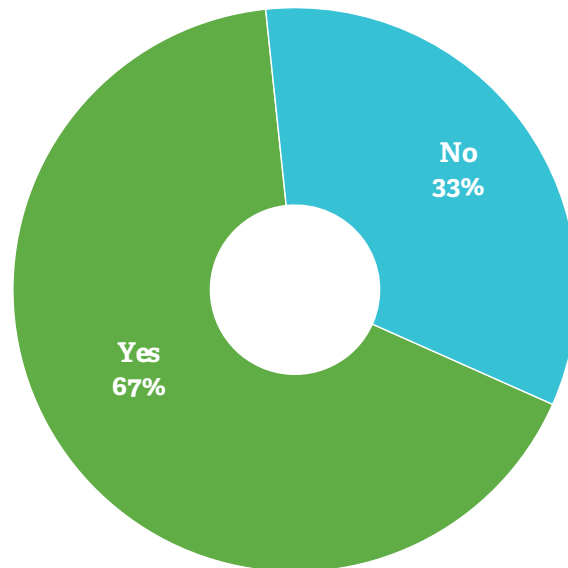
■ Within the past 24 hours ■ Within the past week ■ Within the last month ■ Never



Blogs

Q:

Does your firm publish Practice or Industry Specific Blogs?



Q:

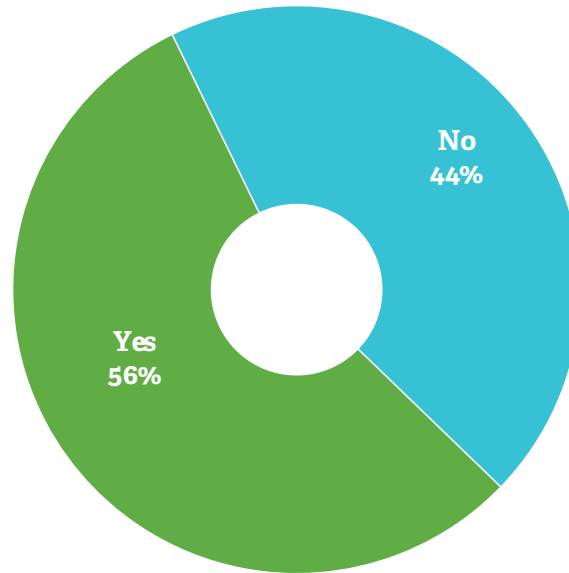
On average, how often does your firm publish Practice or Industry Specific Blog posts?



Content Marketing

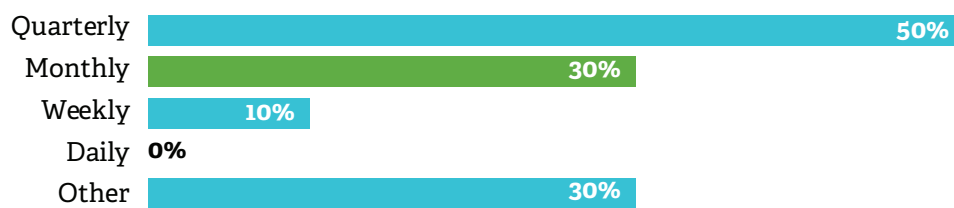
Q:

Does your firm publish a Firm-Wide Newsletter for clients?



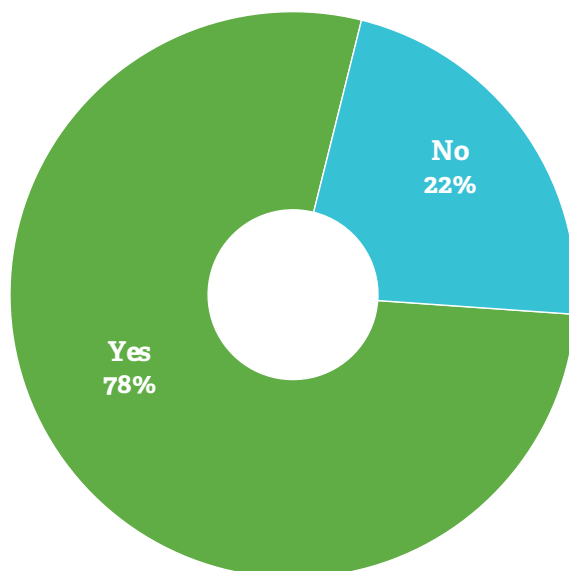
Q:

How often does your firm publish a Firm-Wide Newsletter for clients?



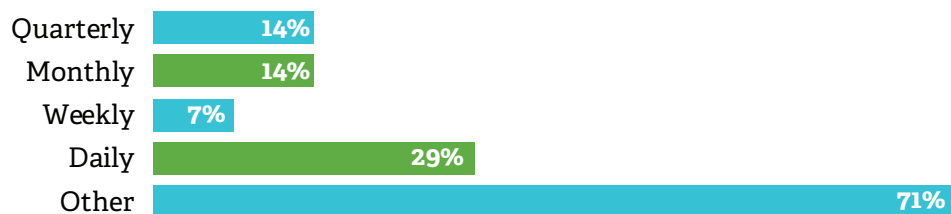
Q:

Does your firm publish Client Alerts?



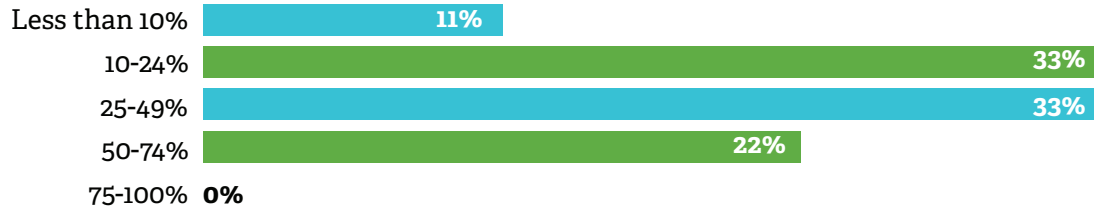
Q:

How often does your firm publish Client Alerts?



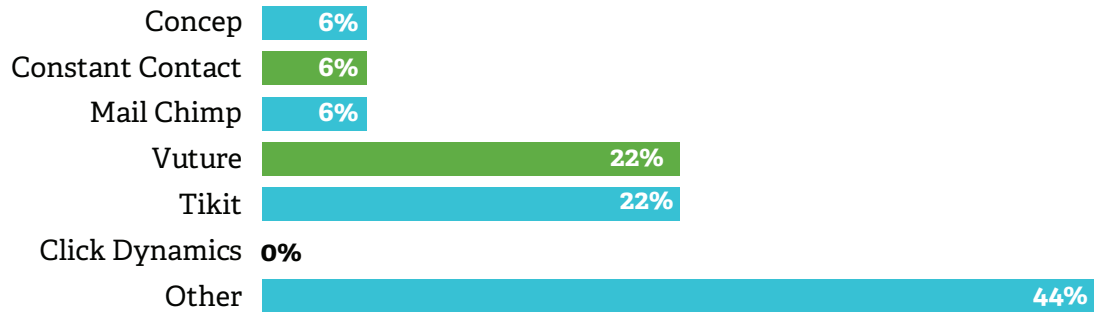
Q:

By how much did your e-mail lists “shrink” after the implementation of CASL (Canadian Anti-Spam Legislation)?



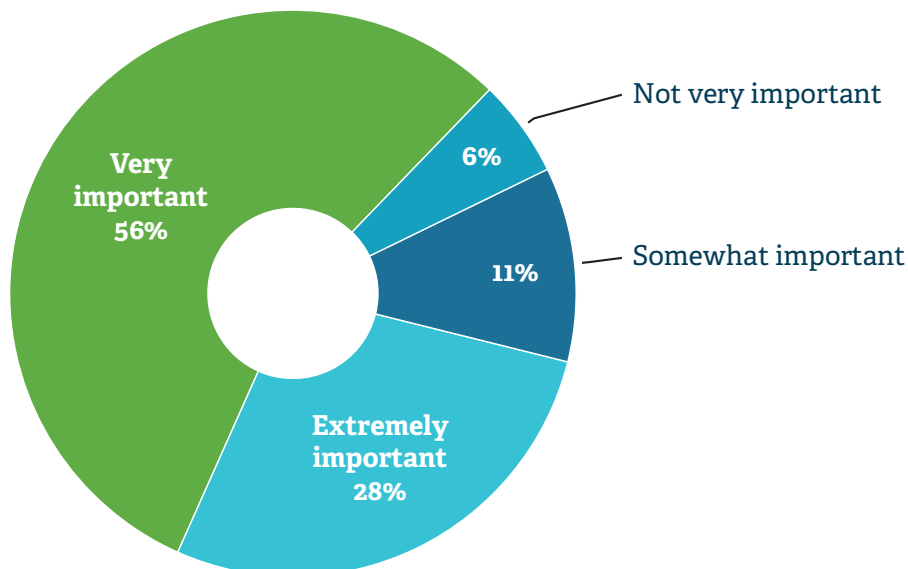
Q:

What tool is your firm currently using for their e-marketing communication?



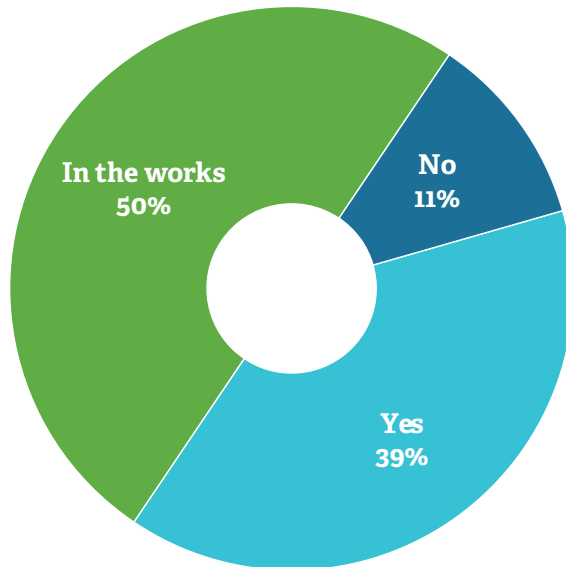
Q:

How important is content marketing to the firm’s overall marketing and business development goals?



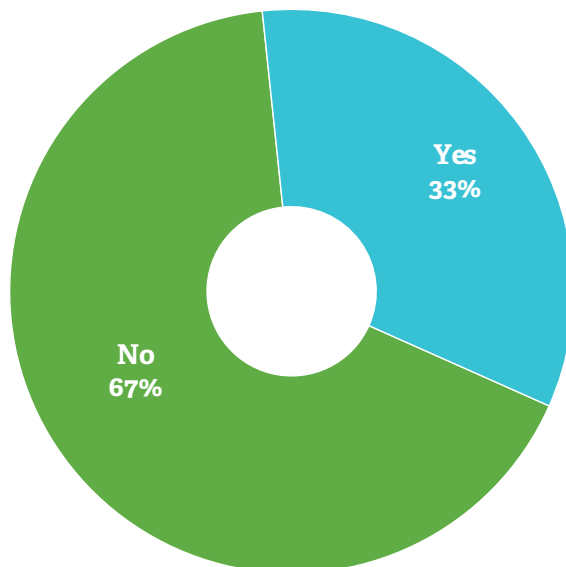
Q:

Does your firm have an active content marketing strategy?



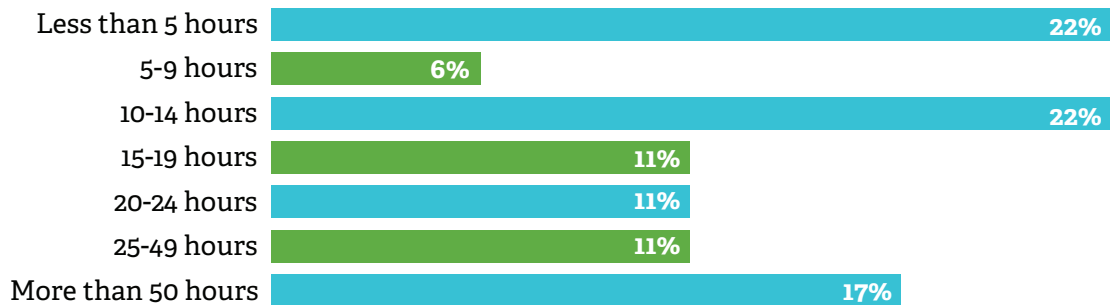
Q:

Does your firm employ a dedicated content marketing professional?



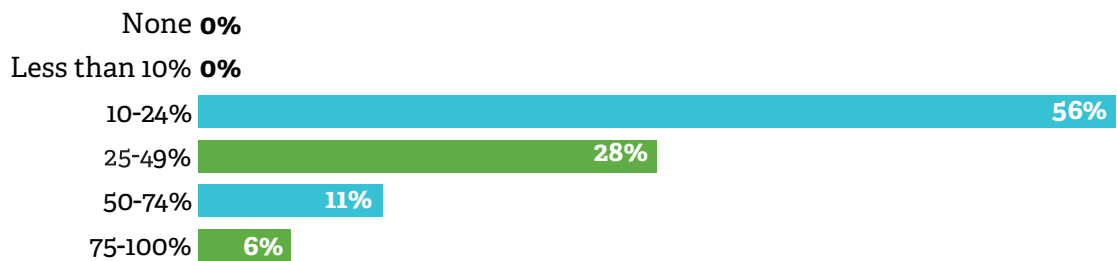
Q:

How many hours per week are invested in Content Marketing for your firm by the marketing department?



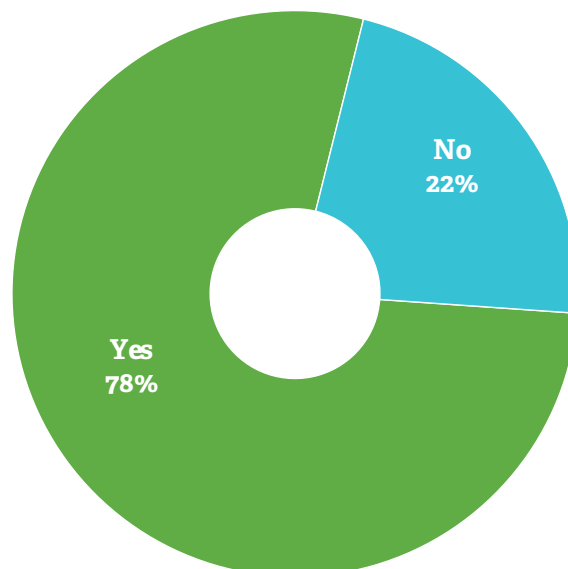
Q:

What percentage of your lawyers participate in providing content for marketing purposes?



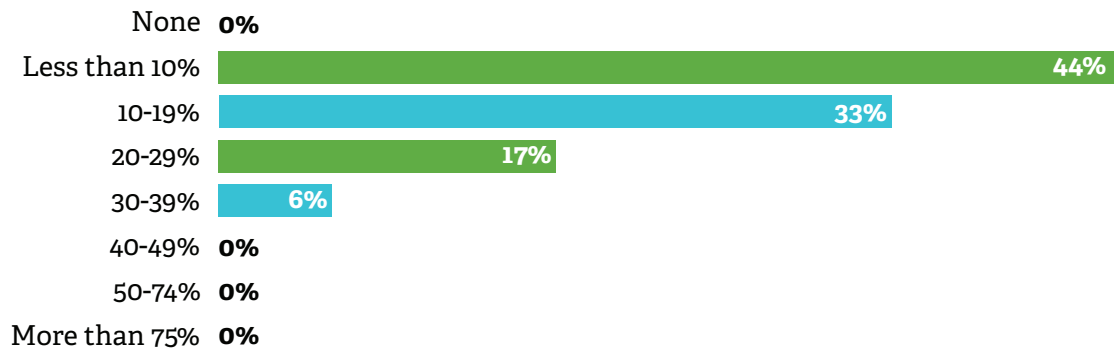
Q:

Do you anticipate an increase in content marketing next year?



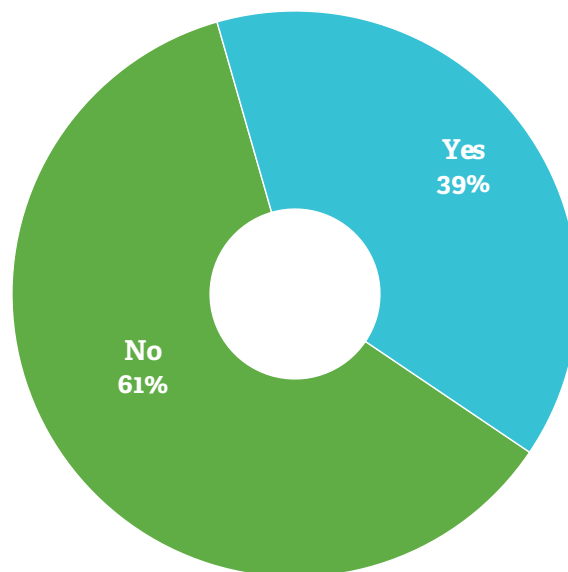
Q:

What percentage of your annual Marketing budget is dedicated to Digital Marketing (including social media and content marketing)?



Q:

Do you anticipate an increase in budget related to Digital Marketing (including social media and content marketing) next year?



Verbatim Responses

We asked CMO respondents the following open-ended questions. Below is a sample of their responses.

Q:

Please describe the extent to which you use and participate in Social Media.

- “ Just LinkedIn - almost daily.
- “ We have replaced our news wire services with Twitter. LinkedIn is as essential as lawyer bios. LinkedIn and Facebook re-distribute our content. Facebook is used for our community info.
- “ Our participation is minimal, but activity does increase around the time of sponsored events.
- “ Mostly personal, not professional - With the exception of LinkedIn. LinkedIn is entirely a professional outlet for me.
- “ Personally, I use social media daily. Professionally, within my role, rarely.
- “ Our firm uses both Twitter and LinkedIn as our main focus of SM communications. I would say 95% of our lawyers use LinkedIn and about 20% use Twitter.
- “ Track competitors, follow legal blogs and stories, share news about our firm.
- “ We post all our updates on LinkedIn and Twitter and we have a channel on Youtube
- “ Networking via LinkedIn; recruitment on Linkln
- “ I am more of a listener and I use it to maintain my professional network.

Q:

Where do you think the greatest value and promise lies in the use of social media?

- “ Active outreach with meaningful tidbits of information.
- “ All our clients are and will be there shortly
- “ We encourage all lawyers to be on LinkedIn for the “google” power it gives an individual lawyer. Some of our lawyers have used Twitter and find they have made valuable connections.
- “ A consistent, unified approach with the firm strategy always in mind. Also identifying targeted audiences and using relevant materials to get their attention is critical.
- “ LinkedIn - professional networking and Instagram / Twitter - getting branded messages out and building community
- “ It is a great way to show that we are connected with what is happening and keep track of the latest information. With a blog or newsletter the information can be stale before it ever gets to our clients, but with SM we can get that information out a lot faster than other mediums.
- “ LinkedIn for sales generation and showcasing expertise (via articles/posts). All for building general profile. Blogs for showcasing expertise.
- “ Twitter and LinkedIn
- “ Branding, raising your profile and expertise and as a result, your credibility; one of the ways of verifying candidates in an informal/unofficial way
- “ Networking



Q:

Where do you think the greatest value and promise lies in the use of Content Marketing?

- “ I’m not sure.
- “ To differentiate, retain, grow and attract business.
- “ Positioning our lawyers as thought leaders and leading-edge lawyers in their respective practice areas.
- “ Targeting the audience with relevant and useful information - and doing so, in a timely manner. Being the first out of the gates, although difficult, should be the goal. the content should be written to entice action on the readers’ part to get in touch with the firm, thereby enhancing the client relationship.
- “ Twitter and LinkedIn
- “ Firm branding; raising individual lawyer branding/profile and increasing their perception of credibility by increased content and visibility
- “ Dunno

Q:

What is your biggest challenge to move marketing-related projects forward?

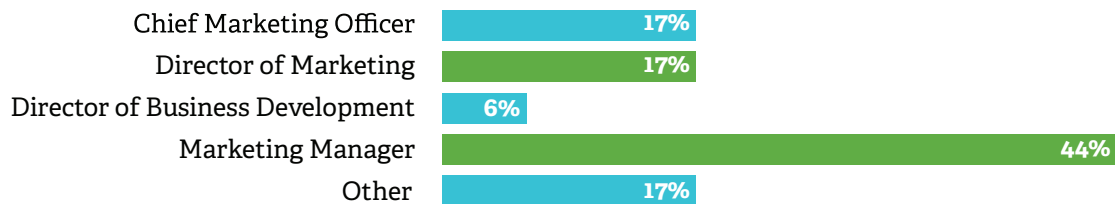
- “ Showing ROI
- “ Time and resources
- “ Money
- “ The biggest challenge is buy-in from Management. A small percentage of lawyers understand the value of marketing and actively promote the firm on and offline.
- “ Multiple marketing functions operating at different levels of experience and with multiple competing priorities. Also too many levels of approval to go through (committees, boards, managing partners etc)
- “ Budgets Buy-in from lawyers Resources - time
- “ Lawyer engagement can be a challenge. When they are busy, marketing becomes a lower priority.
- “ Planning tends not to be an issue but implementation is always a challenge. There is a shift from longer term marketing strategies to immediate return project so some marketing projects get shelved as a result.
- “ To have relevant content for all our different readers
- “ Establishing the role and filling it which we are in the process of doing
- “ Getting the lawyers to engage with social media and creating content. .



Demographics: CMO/Senior Marketers

Q:

What best describes your job title?



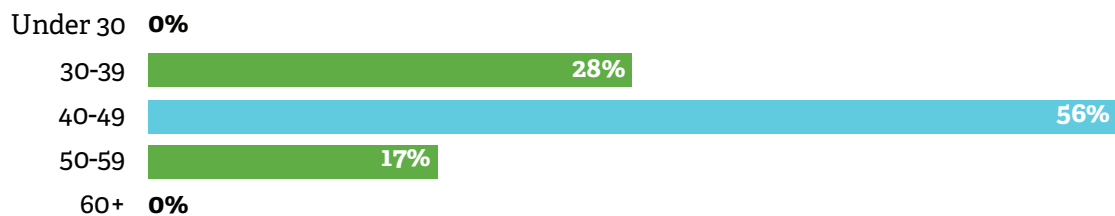
Q:

What best describes the responsibility of your position?



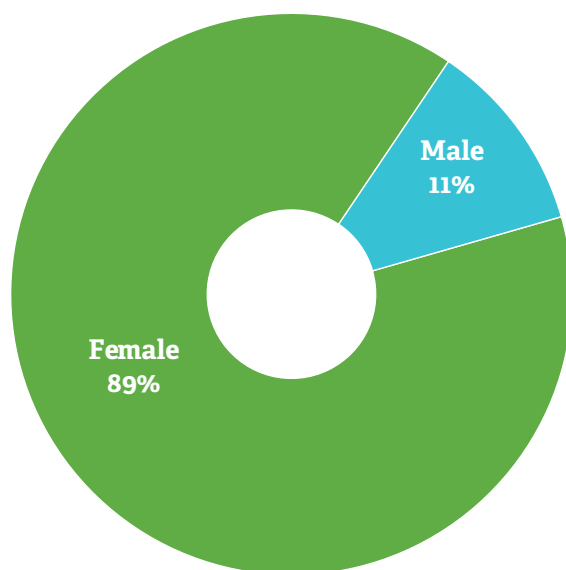
Q:

What is your age?



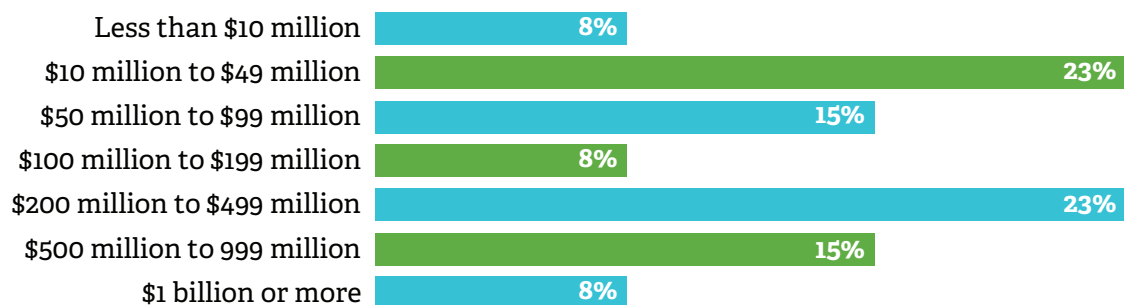
Q:

What is your gender?



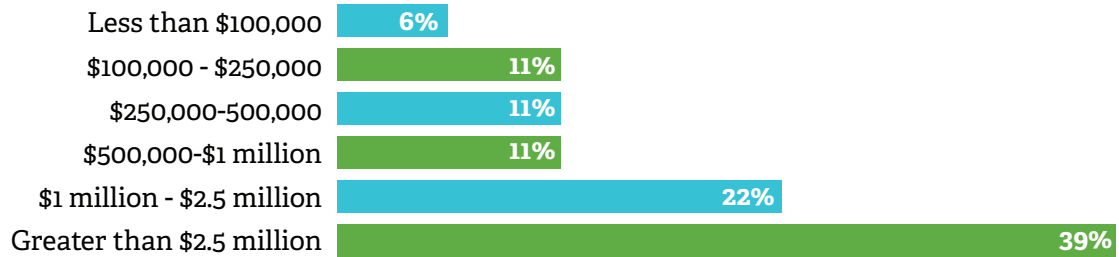
Q:

What were the 2014 revenues of your Law Firm?



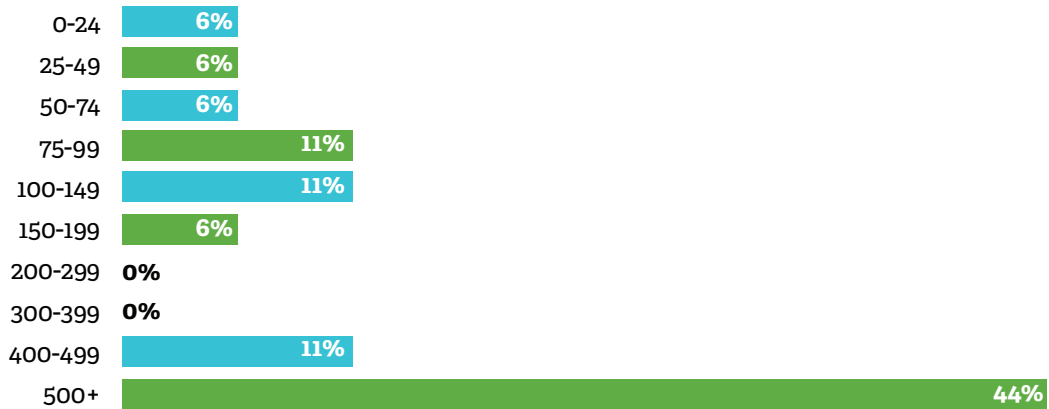
Q:

What was your firm's Annual Marketing Budget (excluding salaries and lawyer business development activities) for 2015?



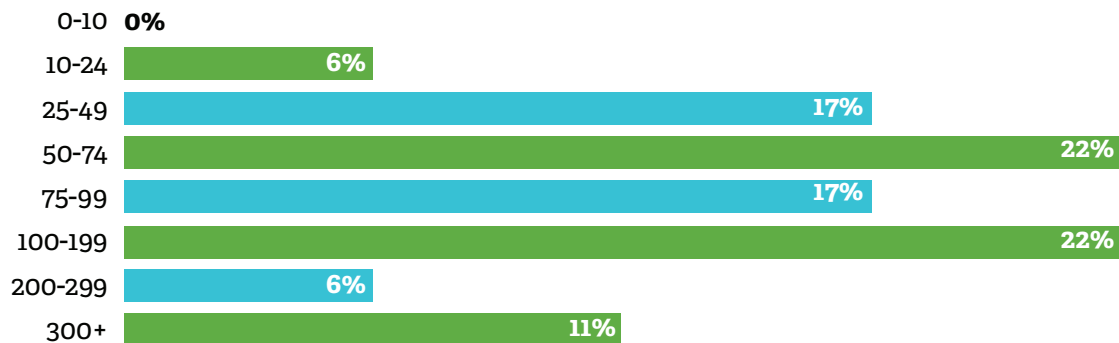
Q:

How many lawyers are in your office?



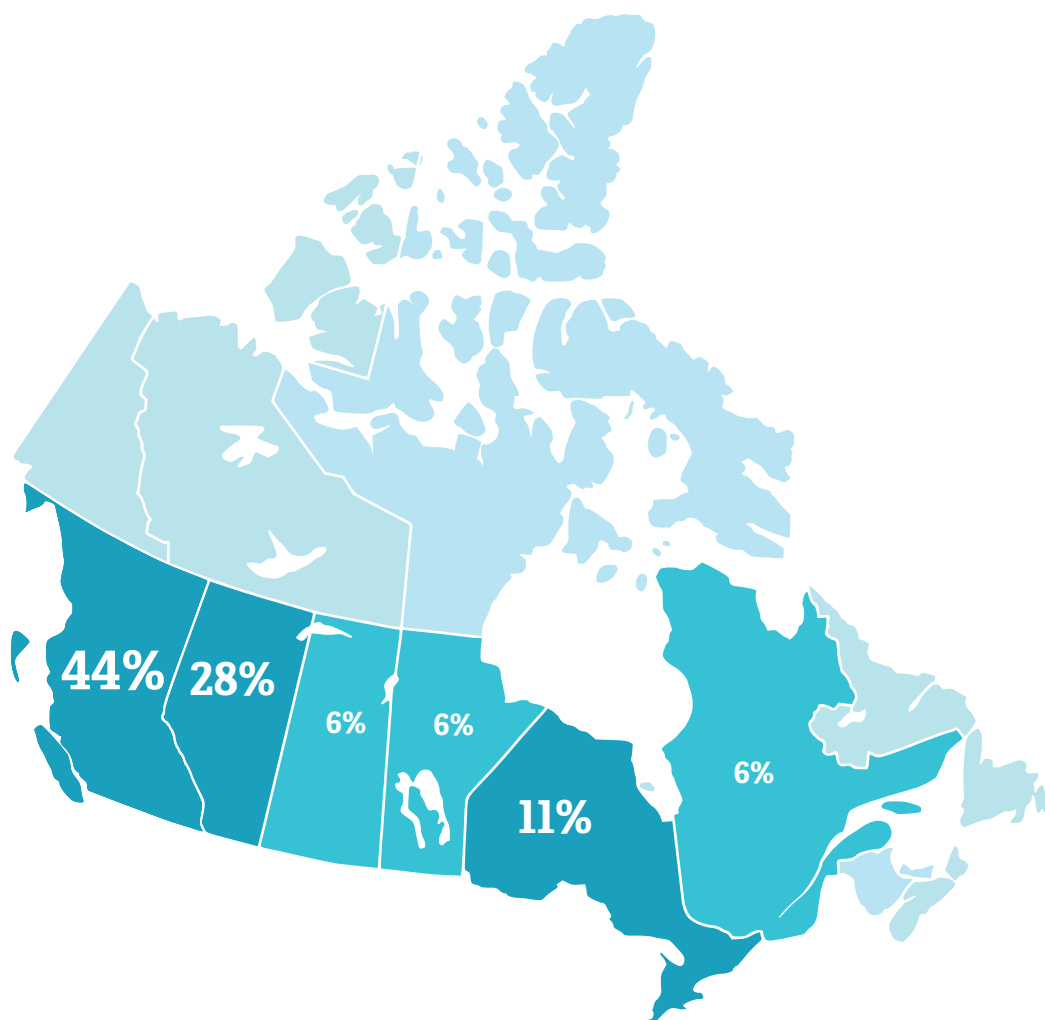
Q:

How many lawyers work at your firm in total?



Q:

In which province or territory are you located?



METHODOLOGY

In late 2015 and early 2016, *fSquared Marketing* distributed the Canadian Legal Digital Survey via email to a group of In-House Counsel at top Canadian Companies across the country. Respondents identified themselves as GCs/Chief Legal Officers, Deputy/ Assistant GCs, In-House Counsel, and related titles. A separate, but similar, survey was distributed to the Managing Partners of Canadian law firms or regional Canadian offices of global law firms. A third survey was sent to Chief Marketing Officers and those holding Senior Marketing roles at the largest law firms and boutiques across Canada. The results of these surveys were tabulated and analyzed by *fSquared Marketing* and the resulting report was released in September 2016.

41 counsel responded to the in-house counsel survey of 465 who were invited to participate (a 9% response rate); 6 Managing Partners responded to the law firm survey of the 202 who were invited to participate (a 3% response rate); 18 CMO/ Senior Marketers responded to the CMO survey of the 86 who were invited to participate (a 21% response rate).

Within the survey report, percentages in certain questions may exceed 100 percent because participants may have been asked to “check all that apply”.







ABOUT FSQUARED MARKETING

fSquared Marketing provides strategic consulting and marketing services to law firms. We offer clients a full spectrum of services, including strategic planning, digital strategy, business development, client management, branding, website design and lawyer training.

fSquared Marketing's expertise comes from our thorough understanding of the North American legal marketplace and our detailed knowledge of the particular needs of Canadian firms. We take pride in offering practical, measurable and proven solutions to the challenges our clients face. The team at fSquared Marketing can both develop strategic plans and implement them with a focus on growth. We know law firms and we get results.

To learn more about fSquared Marketing and the services we offer visit *fsquaredmarketing.com*.



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(marketing)