Wednesday, September 13 |10:15 am – 11:15 am

Workshop | Breakout Sessions #1

Becoming a Better Legal Marketer: How to Go From Doing to Thinking Strategically and Asking the Right Questions

Body of Knowledge: Marketing Management & Leadership

Presenters

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Session Overview

So often, the marketing team is hit with a volume of requests and first worries about getting them all done. Instead of just completing a task, be sure to stop and add value. This session will take legal marketers through a variety of endeavors, including asking the right questions. Learn how to enhance your events, legal alerts, client meetings, social media, proposals, and lateral integration by thinking about strategy and not just logistics. Becoming a better and more strategic legal marketer will add value to your team, as well as appreciation for what legal marketers do for attorneys.

Session Notes

- Henry Ford: "If people asked for what they really want they would ask for a car, not just a faster horse."

- **Avoid the randomness of marketing** – Use Yes – and statements (Yes that's a great idea and have you thought about x and y) Great to use data
    - Sometimes you can do less but do it WELL
    - Work on using your voice to shift it to a strategic mindset

- **Being Strategic** – marketers are the premeeting before you meet with the attorneys
    - Being proactive is the goal but when we get busy things shift to reactive
    - Strategic mindset to keep the big picture in mind

- **Shift from tactical to strategic**
    - Not operating from default
    - Separate ourselves from the pact
    - Focus less on day-to-day operations and focus on longer term vision
    - Move from responsive to proactive – takes thinking and planning
    - Process based vs problem solving and can focus on what and why
    - Focus from getting things done right vs getting things done well (efficiently and wholly)
    - Check the box vs understanding the need behind the request
    - Prioritize the urgent should shift to prioritize the important

- **Seven Skills to Practice**
    - Elevate your perspective- higher elevations help you see more – what can you do more to make sure each stakeholder has a better experience
    - Think Forward- think ahead of time – what do you want to happen not just as a result of the event but seven steps down the road
    - Collect new and different perspectives – Educate yourself on what is going on in the world and in your field each day
    - Anticipate the obstacles – what's best case outcome and what's the worst-case outcome what is the likely case outcome, and how can I be prepared
    - Prepare possible solutions
    - Manage your messages – Use Yet. And instead of NO -
    - Sharpen your question asking questions – ask more thoughtful questions to improve the quality of work and strategies – If you are intimidated to use your voice - Just ask the question others didn't think of

- **The Strategic Core4**
    - Objectives – who are you trying to reach and what are you trying to get them to know about the firm
    - Discovery Questions -
    - Key Message – finalize as the one key message that we want to get out
    - Definitive next steps – what is the desired action if we do xyz..

- **Not just good enough to ask questions**... Need to ask the right questions

- **Pitches and Proposals**
    - Do we want this work? Too many times that RFP you get it going and then someone shuts it down because they do not want that type of work – Need to ask what work we want and who are our ideal clients
    - Who is your audience?
    - Who knows Whom? (and other research) - CRM information is very helpful to do this research
    - Are they looking for high level overview or details? Put the time in to not just check the box.

  - How do we differentiate ourselves from competition?
  - Who is the right team? Make sure the team is aligned with the client -
  - What are the most important deciding factors? Look at advisors they used before, what were the terms of past work, what is the most important thing to them
  - Update material – put together a process that you consistently update your materials

- **Client Meetings**
  - Who should be there? Relationship building, research and prep are the key.
  - What is the goal/purpose of the meeting? To land the work or re-brand partner or get to know new person at company.
  - What type of event is best to achieve the goal
  - Is material needed?
  - What research do you need to weaponize your team? Helps you feel prepared
  - Debrief: What were the highs and lows of the meeting? We often fail at this one, but it is most important because if you can hear the why behind not being hired. This is where you learn and grow. Do the debrief quickly or soon after so it is fresh in your head.
  - What follow-up is needed?

- **Legal Alerts**
  - So what? Why do I care, who cares, and how fast they need to know. Better to digest and find the great headline and audience so that it is strategic and more useful.
  - Who is the target audience and who does it impact?
  - Does this title communicate the thesis?
  - Would I want to read it? Is it interesting, useful, easy to read, and accessible? Often use a co-author i.e., Involve a cpa firm and then you will get it out to their audience as well that you share.
  - Is it interesting?

- **Events** – events are now smaller – 45 strategic people that will convert is better than 200 that are only minorly engaged
  - Is it worth putting on pants for? Convenient, very interesting
  - Who should be there?
  - What will entice them to come? A speaker, best chef, a client, someone who is a commodity
  - Should the event be in person, virtual, or hybrid? Just getting info or actually someone needs and wants to see or do in person
  - Does the format (Time of day, location, parking) fit the intended audience? Working moms not into happy hour but will do lunch,
  - Are there any conflicts (holidays, big games, etc.)
  - What is the takeaway? Tell them why they need to come and what they will get from the event.
  - How can we get people interacting and connecting? Introducing people to others at their level – private events that give VIP access to special things in your community that can be busy – hot commodities draw people in

- What can we prepare in advance?

- **Attorney Coaching**
    - What opportunities or clients are you trying to grow and get? - how do we get you to look the best with the clients and people you want to be in front of and client you want to get
    - Which

- **Laterals** – develop onboarding plan ahead of time, who do they meet inside and outside – strategically look at how you can best onboard them
    - What drew you to the firm?
    - How do we rebrand you?
    - Who do you need to meet internally and externally?

- **Social Media**
    - How do I get internal, external and influences to follow and interact
    - Culture – who are we outside of the office – what sets us apart -
    - Tags when you get other people involved – ex. new hire tag their school, so they know they are there, and their audience sees us to
    - Best-hashtags.com
    - Non-professional photos on LinkedIn go far. Do it sparingly but they perform well
    - This can raise awareness – not necessarily going to bring new clients but will elevate brand awareness
    - Each channel should have its own purpose and goal

Breakout Session – How can we go from tactical to strategic

- **What could you change to be more strategic in the future?**
    - When hosting an event – send through CRM – personal invites – preparing attorneys for who to meet and network with
    - Agreeing to sponsorships – send a post event worksheet that they think about before they go – so they think forward about its usefulness