Developing an Associate-Marketing Training Program

Presented by
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Developing an Associate-Marketing Training Program

Learning Objectives

• Develop and sell in-house an associate marketing-training program
• Learn the specific activities associates should undertake at each step of their careers
• Discover how to avoid the pitfalls of many partner-led programs
Ross Fishman Biography

- Fishman Marketing, 1997 -
  - 300 law firm retreats, marketing training, CLE/Ethics
  - 200 law firm marketing, branding, website projects
  - Dozens of law firm marketing awards
    - LMA’s “Best of Show” - 5x
    - LMA’s Hall of Fame, Lifetime Achievement Award
    - Fellow, College of Law Practice Management
- Marketing Partner, Ungaretti & Harris, 1994-97
- Marketing Director, Winston & Strawn, 1990-94
- Litigator, 1985-90
  - J.D., Emory University, 1985

Why Train Associates in Marketing?

- Firms investing in associates again
  - Can’t take them for granted any longer
- Millennials value personal development
  - Increases their satisfaction
  - Increases associate retention
    - Turnover is costly, inefficient
- They’re your future
  - Let’s help make them successful.
Why Train Associates in Marketing?

• Good for *Recruiting*
  – “Millennials care *deeply* about their development when looking for jobs”
  – 59% of Millennials say opportunities to learn and grow are *extremely* important to them when *applying* for a job.
  • Having a proven PD program is a differentiator

*Gallup: “How Millennials Want to Work and Live”*

Why Train Associates in Marketing?

• Good for *Retention*
  – Turnover is costly, inefficient
  – 87% rate "professional or career growth and development opportunities" as important in a job
  – “Opportunities to learn and grow" is one of the *top three* retention factors
  – BUT: Only 1/3 *strongly agree* that their work’s learning opportunity was "well worth" their time

*Gallup: “How Millennials Want to Work and Live”*
History

- Lawyers formerly *refused* associate training
- Became popular in dot-com era
  - Competition, “The War for Talent”
- Very popular pre-2008
  - Most 50+ lawyer firms offered regular training
- Recession killed the industry
  - Returned recently
- Training moving to PD professionals
  - Focused on substantive training and CLE

The slides don’t match perfectly
Beware of Partner-Led Programs

“Let me tell you what I did. . . .”
Beware of Partner-Led Programs

• Partners rarely know what actually worked
• “Like getting lectured by my dad.’’
  – “Well, sonny, back in my day....”
• Back then:
  – It was a seller’s market
  – No computers, Internet, social media, AI
  – No global law firms
  – No legal-outsourcing companies
  – “For services rendered in June” invoices
• Profession is completely different now.

Beware of Partner-Led Programs

• Typical associate laments:
  – “What she really did was inherit a book of business from a dead partner.”
  – “[Joe Rainmaker] is the life of the party; he’s out shmoozing every night and has a 6 handicap. I’m introverted—that’s never going to work for me.”
  – “I’m billing 2,000 hours. I don’t have time to market.”
Beware of Partner-Led Programs

• Typical associate laments:
  – “She claims ‘Good work is the best marketing.’”
    • “What, our competitors aren’t smart?”
  – “He says he gets clients by ‘providing excellent client service’ — but his dad is a Senator!”
  – “He made one friend in his whole life, and that guy became GC of a big bank and gives him all his legal work. That’s just dumb luck.”

Effective Partner-Led Programs

• They bring credibility, expertise
  – Good to hear from your own people
• Marketing should prepare the outline
  – What stories, examples will they use
• You’re the expert
  – Talk them through the topic
• Ensure they prepare far in advance
  – Or they’ll get busy and wing it
Starting Your First Program

• Find the simplest path
  – Approving firm-wide initiatives is hard
• Easier to start smaller
  – Dynamic practice group chair
  – High-growth office
  – Have the associates request it
• Create a pilot program
  – Offer one great program
• Offer CLE credit for it
  – Understand and work within the state rules

Role of Marketers, Lawyers
Role of Marketers, Lawyers – Big Firms

- *Larger firms* — *group* presentations
  - Invite everyone
- More formal, structured
  - Work with Professional Development (PD) Dept
- Can train firm-wide, by office, or practice
- Support by practice group
  - Mentoring

Role of Marketers, Lawyers – *Smaller* Firms

- Group sessions *plus* individual support
  - Manage follow up
- May handle coaching *in-house*
- Offer 1-on-1 support, training
  - Each *interested* associate assigned a mentor
    - Mentor quality varies in skill and interest
  - Only invest in the associates who *want* training
    - Can’t change people
    - If they don’t enjoy it, not hungry, *leave them alone*
In-house marketers should present

• Your chance to shine  
  – Showcase your expertise  
  – Pick your most-comfortable topic

• Even if you’re not a great presenter  
  – Get presentation training  
  – Prepare *far* in advance, edit  
  – Videotape, rehearse  
  – Co-present with an expert

It’s a Long-Term Process

• Schedule programs *far* in advance  
  – Get on people’s calendars  
  – Eliminate excuses

• Show the topics, the flow, the arc  
  – Skills build on each other over time

• Take attendance  
  – See who’s investing in their careers
Mandatory, Optional, or a Perk?

• **Mandatory**
  – *Why force* people to invest in their careers?
  – Resistant naysayers slow you down

• **Optional**
  – Self-selected, motivated
  – Now you know who to focus on

• **A Perk**
  – Only offer to hand-picked highest achievers
  – Create interest, demand, competition

The Elements of an Associate Program
Lawyer First. Marketer Second.

Tone it down, Ross.

What Should a Program Include?
Elements

- Some *evergreen* elements
- Give them the big picture
  - The long-term arc
  - How all the pieces fit together
- Show that it’s a long-term effort
  - Gradually, slowly, consistently over time

Who should train?

- Combine in-house and outside
  - Lawyers
  - Marketers
  - Clients and purchasers
  - Outside consultants
- Firm members offer credibility
- Consultants are professional trainers
The Elements of a Training Program

• Networking training
  – Give them specific skills
  – **Reduce their insecurity** with specific info
    • How to initiate and exit conversation with strangers
    • What to ask, say, do
    • Name tags, business cards, following up
  – Show that it’s about *listening*, not talking
  – Avoid the bragging
  – Elevator speech
  – Networking today includes **online**
The Elements of a Training Program

• Variation: *Interactive* Networking
  – All professionals need to learn networking
• Invite their same-aged peers from:
  – A large local bank
  – A large accounting firm
  – Your favorite miscellaneous clients
• Teach them to network and work a room
  – Learn to exchange cards by *doing it*
  – Creates actual professional relationships
• It’s a nice value-add

The Elements of a Training Program

• Focusing their marketing
  – Find a specialty
  – Combine a passion, hobby, interest, experience
• Most important program
  – With a good target, the marketing plan writes itself
  – Start them thinking about this early
  – Find the trade association to dominate
The Elements of a Training Program

• Selling skills
  – Listening, relationships, trust
  – What rainmakers *really* do
    • Helping people solve problems
    • Sincerely wanting to help
    • If it feels awkward, *stop*
  – *Are* you the best solution?
    • If so, you should *want* their business
  – Remove the anxiety, not selling used cars
    • “So, what’s it going to take to do some business?”

The Elements of a Training Program

• Cross selling
  – Maybe
• Yes, you’re doing it badly
  – Can you do it better? *Maybe.*
• Identify the internal obstacles
  – *Compensation*
  – Portability, education, communication, trust
• “18 reasons cross-selling sucks”
  – https://goo.gl/uSRfSx
The Elements of a Training Program

- **Internal Firm Education**
- **What does the firm do?**
  - What practice areas?
  - Particular areas of expertise
  - Memorable specialties
- **Encourage conversations across practices**
  - Knowledge helps sell the firm

The Elements of a Training Program

- **Individual Marketing Plans**
  - *Nothing happens without a plan*
  - Avoid random wandering
  - Short, specific, action oriented
- **Start with a niche practice, sub-specialty**
  - Identify a specific group, association
  - Focus their marketing on that target
  - Get active, become a visible leader
  - Build their personal brand
The Elements of a Training Program

• Building your personal brand
• Identify your specific area
  – In five years — what do you want to be famous for?
• Long-term plan
  – Write, speak, network
  – Leadership in a valuable group

The Elements of a Training Program

• Telling your story online
• You are who Google says you are
  – Developing your online reputation
• Social media overview
  – How all the online tools fit together
  – Teach LinkedIn skills, writing a good bio
The Elements of a Training Program

- Critical conversations
  - Speaking with existing clients
  - Phone calls with their client peers
- Identifying new business opportunities
  - Friendly conversations that turn up new leads
- When they quit, keep them as a client

The Elements of a Training Program

- Client service
- The difference between Skills and Service
  - Show how important *client service* is
  - Detail your firm’s standards, expectations
    - Responsiveness
    - Communication
    - Accessibility
    - Timeliness
The Elements of a Training Program

- Client Panel Discussion
  - *Very* helpful
  - They need to hear real clients’ voices.
- *Must* be aggressively moderated
  - Interrupt, no scripts, no talking heads
  - Get beyond the platitudes
- *Tell* them what you want them to cover
  - “I can find smart lawyers at every firm”

Include a Client Panel Discussion

- How long it took before they hired you
  - Staying in touch *over time*
- Being helpful
- Niche/industry expertise is important
- Learning their business
Include a Client Panel Discussion

• Listen for:
  – I can go to a free sporting event every night.
  – I never have to buy another lunch or dinner.
  – Think about me, offer new ideas.
  – Save me money, do my job better.
  – I’m too busy to go to a football game.
    • Of course, if it’s a great game, playoffs...
  – Don’t talk, listen.

Include a Client Panel Discussion

• What was your best law firm experience?
  – Why?
• What was your worst law firm experience?
  – Why?
Include a Client Panel Discussion

• Why did you hire us?
  – How long did it take?
• Why do you keep using us?
  – What do we do well?
  – Where can we improve?
• What other law firms do you use?
  – What do they do well?
  – Where can they improve?

Big Picture
Big Picture

- Learn to be a great lawyer
  - Technical skills and client service
- Build your long-term marketing infrastructure
  - Leverage social media
- Market yourself internally
- Gradually add marketing, networking
- Build your resume with bar associations
- Develop a specialty niche or industry
  - Write, speak, network, become a market leader
  - Build your personal brand
- Look for opportunities with existing clients
- Spend more time with prospects, referrals

“Ultimate Law Firm Associate’s Marketing Checklist”

- Simple, step-by-step, year-by-year checklist
  - 50-page book
  - Retail $25
  - Volume discount
  - Amazon.com
    - https://goo.gl/rxWSfH
First-Year Associates

MINDSET:
• Become an excellent lawyer.
• Create the platform for later success.

First-Year Associates

• Become a great lawyer
  – Technical skills and client service
• Build your network
  – Don’t lose touch with existing contacts
• Keep in touch
  – Events, newsletters, holiday cards, meals, sports, professional events, social media, phone calls...
First-Year Associates

- Join *one* local or national bar association
  - Get *actively* involved on *one* committee
  - Meet local peers
  - Enhance resume
  - Long-term goal – *chair* a small committee ~5th year

First-Year Associates

- Don’t eat at your desk
- Go out at least:
  - *Once/week* with a lawyer *inside* your practice area
  - *Twice/month* with a Firm lawyer *outside* your practice
  - *Regularly* with friends and contacts
First-Year Associates

- Learn about firm, clients, and services
- Develop relationships with firm attorneys
- Build personal brand for quality, integrity

First-Year Associates

- Draft your website biography
  - Update it with successes, articles, committees
  - Be sensible re college activities
First-Year Associates

• Join, update LinkedIn
  – Professional, friendly
  – Quality photograph
  – Follow friends, peers, contacts, firm lawyers
  – Post occasionally
  – Get a personal URL

Second-Year Associates
Second-Year Associates

MINDSET:
• Build your internal brand.
• Develop your network.

Second-Year Associates

• Become a great lawyer
  – Improve technical skills
• Continue first-year activities
• Stay in touch
  – Join LinkedIn Groups
MINDSET:

- Continue developing your external network, including relationships with your in-house contemporaries.

- Start developing a toolkit of the soft skills that will become important to your success, e.g., an elevator speech, public speaking, writing or co-authoring articles or blog posts, interpersonal communication skills to inspire confidence.
Third-year Associates

- Continue focusing on skills, service
- Begin *expanding* your network
- Increase marketing efforts
  - Networking
  - Social media
- Participate more actively in bar association

Third-year Associates

- Learn an elevator speech
  - Tailor it your audience
  - Focus on the *benefits*
- Read legal and industry publications, blogs
- Update LinkedIn profile
Third-year Associates

• Firm clients you speak with today can become your clients later
  – Befriend the same-aged clients you interact with
  – Be the best lawyer they know
  – When they move to a competitor they’ll hire you

Third-year Associates

• Learn to turn social contacts into potential business contacts.
  – This is a long-term process
    • 7 to 20 contacts
  – “Active listening” is important
  – Work comes in by listening, not talking
  – Find ways to help them become successful in their careers
Fourth- and Fifth-Years

MINDSET:

- Continue refining your legal skills.
- Expand your network and build your external reputation and resume.
- Focus on client-service skills and interacting with clients.
- Identify a narrow specialty
MARKET LEADERSHIP

Your Long-Term Goal: “Market Leadership”

• Not “Get your name out there”
• *Dominate* an area
  – *Own* something
  – Industry
  – Sub-specialty practice
  – Geography
  – Combination
Umbrella or Product Lines?

• How are lawyers narrowing?
  – Market Segment
  – Style / Attitude
  – Service
  – Target Community
  – Geography
  – Practice Specialties
  – Industry
Industrial Tires

Industry Group

- Where to start?
  - Your passion
  - Industries / clients you enjoy
  - Firm’s target industries
  - Education
  - Existing clients
  - Previous experience
  - High-growth industries
  - No competitors
Fourth- and Fifth-Years

- Continue refining your legal skills
  - Gradually expand network and build resume
- More networking
  - Don’t try to “sell” anything
  - Investing in the relationship and your future
- Seek to lead a bar association committee
Fourth- and Fifth-Years

- One face-to-face marketing effort per week
  - Meals, sports, social event, association meeting...
- Host a meeting at the firm for your group

Fourth- and Fifth-Years

- Learn active *listening*
- Keep the conversation focused on *prospects*
  - 80/20 Rule: THEY do 80% of the talking
- The more *they* talk:
  - The *smarter* they think you are!
  - The more they *like* you!
Fourth- and Fifth-Years

- Write one article, blog post per year
  - Building resume, credentials
- Update your mailing list
  - Can’t just rely on LinkedIn, social media
- Chair your law school’s fifth-year reunion
  - Also 10\textsuperscript{th}, 15\textsuperscript{th}, etc.

Fourth- and Fifth-Years

- Give a Speech
  - Goal: give the conference’s BEST speech
  - Never sell from the podium
- Select topic carefully
  - Something they can’t get from every other lawyer
  - Make them remember you
Sixth+ -Year Associates

MINDSET:
• Start demonstrating that you’re ready for partnership.
• Stay in touch with and provide value to clients.
• Share successes with contacts.
• Enhance external profile and increase visibility.
Sixth+ -Year Associates

- Work with practice leader to set goals
- Reduce/eliminate bar association activities
  - Unless you have a referral practice
- Focus marketing/networking on industry group/
  - Work to leadership position
- Participate in RFPs, new-business competitions
- Read a “Public Relations 101” book

Sixth+ -Year Associates

- Work with practice leader to set goals
- Continue above activities, plus:
  - Meet with contacts at other professional firms
  - Do two face-to-face marketing efforts per week
  - Monitor media re client and contact companies
Sixth+ -Year Associates

• Visit clients’ offices, factory
  – Dress for the location
  – Tour the plant
  – Meet employees, ask questions —
    • Do not sell

• “The best marketing you can do!”

Hey you!

My mom wants you to evaluate Ross’s session.

I mean it.

Don’t make me ask you again!

Thank you!
Need a new website or marketing upgrade? Marketing training?  

Please call any time!

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