

Tools Law Firms and Lawyers Need in Seeking Out Business

The activities that comprise a law firm's marketing mix-business development, promotion, and client care almost always have a major impact on a firm's IT planning.

Many factors have relevance when planning for the information services and delivery capabilities of marketing activities. Generally, these activities are: information intensive; typically involve collaboration among multiple team members (client teams, practice groups, consultants, and the like); media rich (Internet technologies, presentation support, multiple databases); and decision-oriented.

Supporting marketing with appropriate technology is complex and can be expensive. And too often there is tension between the marketing and IT functions in firms, which might be avoided with more effective planning and teamwork between these two areas.

In many firms there is a misconception that technology--with rapid advances and improvements coming out daily--is a competitive differentiator. For example, having a website with the latest bells and whistles may look great and help a firm stay ahead of its competitors, but will it help a firm accomplish its business goals? The risk is that the opposite will be true and that technology can inhibit firms from reaching their goals. First, clearly defined goals and objectives need to be identified and agreed to based on analysis and planning, and then technology initiatives should be selected to support these goals.

Planning Ahead

To clear up some of the confusion and provide some focus, let's look at some of the planning considerations of the professional services marketing function:

Evolving Service Models: Customers' needs and preferences are changing, as is the sophistication of consumers of legal services. Law firms are moving towards client-driven service models, where clients call the shots and law firms must have a clear understanding of each client's needs and preferences, and then act as a knowledge broker and "infomediary." In a tactical sense firms will need to develop awareness about what clients want, and in a strategic sense they will need to adapt their practices toward high-value client requirements. To get and maintain a competitive advantage, firms need to re-define how they deliver services, and do so in a manner personalized to key clients.

Dynamic Content: Almost every law firm has a contact or client database of some sort, but many are disappointed by their systems to the point of utter frustration. A first problem that some firms run into is that these databases are very people-oriented and surprisingly dynamic. The content erodes for a variety of reasons that are fairly obvious in hindsight. People change titles, change jobs, change names, and can often play multiple roles in different organizations.

Experience shows that contact databases erode at a rate of about 30 percent per year if they are not maintained. This means that there is a significant job to be done in maintaining a contact database even after a firm has completed the difficult job of getting it built. It is important, therefore, to think about how this will be done before deciding to launch efforts to use contact databases for outreach efforts.

Also, many firms only use a fraction of the capability of the database, and therefore spend significant sums for what ends up being static and little more than a mailing list. While most of the commonly used systems on the market today are highly effective for managing client relationships and warehousing client satisfaction and preference information, firms are not using them at this level.

Knowledge-Based: Many marketing efforts depend on the lawyer's insights and other knowledge, but it is difficult to capture and capitalize on this information. For example, information about who-knows-whom and clients' preferences can be useful in focusing a firm's marketing efforts.

It would be useful, therefore, to reflect lessons learned from knowledge management implementations when planning certain marketing efforts.

First, knowledge-based systems require significant behavior change on the part of the lawyers who probably are not used to sharing the kinds of information mentioned in the previous paragraph. The cultures of many firms are such that successful lawyers are very secretive about information that has helped to make them successful. They also may be uncomfortable working directly with computers for anything other than simple e-mail.

Getting lawyers to routinely update and source a contact database will require varying degrees of behavioral change, and this comes hard to most people. It will be important to have sponsorship from visible and respected lawyers in the firm, rather than having the effort perceived as something driven by the marketing department or by IT.

Firms are finding that relationship management systems reach into far corners of their operations, and they are not things that can be implemented out of the box. Success with integrated marketing systems is more of an ongoing process, [and it benefits from starting small and building on success](#). Each project should have a defined beginning and end, and set the stage for other projects that follow.

With marketing systems as with knowledge management projects, it is also important to assure that support resources are available to sustain the effort after it is started. There should be close ties to the practitioners so that the support is consistent with their expectations.

Internal vs. External Focus: Marketing has applications that are internally focused (for example, practice group home pages, expertise databases, and proposal response systems) and externally focused (for example, extranets, team-oriented work sites or deal rooms, Web-based briefings for selected clients, and the like), and care needs to be taken to select the right technology tools and systems, as well as to be ever-mindful of client confidentiality concerns.

Offering services to clients raises certain implications for management of a law firm's technology operations. Directory systems must be integrated and managed carefully to assure that clients have access to appropriate resources and no access to a law firm's confidential systems or assets. Clients will have expectations that a law firm's services (as with other Internet-based services) are always on and available, and these expectations must be reflected in a firm's support systems and approach.

Target-Rich Environment: There are more marketing-related projects on any firm's "wish list" than there could ever be the time or resources to address. So the critical question becomes: "Which projects should we invest in and why?"

To align the myriad marketing goals with the realities of available resources and time, you will need to perform a careful analysis. You will find that there are many ways that marketing programs can touch or affect a firm's information technology, including new applications, databases, coding schemes, network infrastructure, and collaboration tools. How much work is required will depend not only on what a firm wants to do, but where it is at the beginning of the development process.

For example, if a firm lacks really dependable infrastructure, there can be significant work to do simply to

create the platforms required by highly integrated marketing systems.

The management challenge becomes where to start and to understand why a firm should do some projects as opposed to doing other things that might seem more interesting or desirable. An objective of the planning process should be to understand how projects vary according to their value and ease of implementation, and to use that information in setting the order in which they should be attempted.

Setting Priorities

Value can be assessed by examining the degree to which various projects would provide benefits to the firm through their successful implementation. Specific factors to consider include: support for firm or practice-group strategies, economic benefits, cultural change, keeping pace with efforts of competing firms, or satisfying clients' needs.

Many times firms will begin implementation efforts without taking time to assess the success and risk factors inherent in the work being undertaken. These can be analyzed by considering factors such as: required behavior changes, likely end-user acceptance of the proposed approaches, clarity with which requirements are perceived, complexity of the work involved, estimated scale of the costs involved, and familiarity with the underlying technology.

This analysis makes it possible to see the number of projects needed, how valuable they are to the firm, and how easy they are to accomplish. At this point, the overall approach should become clearer. A firm should start with projects that provide high value and that are easier to do, and work their way over time to the projects that are less valuable (in a relative sense) but still important and harder to achieve.

Finally, it is important to maintain proper balance in the overall effort. The trap is for marketing initiatives to be perceived as mainly a technology problem and for the lawyers to ask either marketing or IT: "When will you have the marketing system running?" Early adopters in the field of knowledge management have found that investments in technology should be no more than one-third of the overall costs, with the rest going for efforts leading to cultural change on the part of the users (i.e., lawyers and staff), education, and integration of various business processes.

Conclusion

You will be more successful if you carefully "plan your work and work your plan." To integrate marketing and technology, remember to understand all costs and investments beforehand, measure your progress and make adjustments as needed.

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[How to Hire a Legal Recruiter for Your Law Firm: How Law Firms Recruit Attorneys Using Legal Recruiters](#)