

CHALLENGE

- 51-year-old law firm with 14 partners (10 equity, 4 non-equity), 22 associates, and 3 of-counsel.
- Firm was founded by 3 attorneys (2 retired and 1 remaining), all of whom are prominent members of the community.
- The firm has always enjoyed a strong reputation throughout the region, known for its real estate, commercial litigation, employment, and healthcare work.
- The firm's branding was last updated when they celebrated their 35th anniversary and their social media presence is ineffectual.
- Most of the firm's clients are managed by 5 of the partners (including the remaining founder who is responsible for 22% of the firm's annual revenues).
- Few of the other partners or senior associates show much interest in business development and often do not take advantage of their individually assigned marketing budgets.

SOLUTION

ALIGNMENT

- To create alignment among the partners around the opportunities, challenges, and a plan forward, we assessed the perspectives and experiences of key stakeholders within the firm.
- Facilitated a 1.5-day planning session designed to strategize around the firm's future growth goals and lay out a tactical plan for growing the firm's footprint.
- At the conclusion of the planning session, we had a clear picture of the firm's refreshed vision/mission/values, a list of short and long-term goals for the firm, a detailed communication plan to promote the new narrative, and specific tasks with timelines and assigned task owners.

ENGAGEMENT

- Established targeted client profiles to serve as a guide for identifying opportunities for the firm to be lucrative and impactful.
- Developed a strategic marketing initiative to position the firm for lawyer-to-lawyer referrals.
- Designed measurable practice group and individual business development/marketing plans tailored to each lawyer's interests and strengths.
- Created a *client journey roadmap* laying out the firm's processes for acquiring, onboarding, and delivering excellence to prospective and current clients.
- Developed a tailored engagement strategy that included a *branding bible*, universal messaging, guidelines for firm citizenship, a formalized employee onboarding program, partnership expectations, and actionable goals for the successful recruitment and retention of both employees and clients.
- Designed thought leadership platforms as a marketing tool for several of the partners.
- Provided quarterly business development strategy, guidance, and accountability for partners and select associates, supplemented by individualized coaching.

SOME OF THE RESULTS

- The client profiles helped firm attorneys to identify and prospect for more profitable opportunities, and eliminate time spent on matters that were too small or not the right fit for the firm's vision. (\$237,000+)
- The *client journey roadmap* directly led to higher client satisfaction levels and a number of new matters from existing clients. (\$140,000+)
- Each practice group scheduled monthly marketing meetings with their attorneys to discuss client management, potential new business, and opportunities to collaborate with each other and with other practice groups. This improved rapport within each group and between different teams, and generated internal referrals. (\$72,000+)
- Two partners generated 4 new lawyer referral sources that led to 6 new client matters. (\$110,000+)
- Internally generated referrals of 2 hires saved firm on recruiter and advertising fees. (\$25,000+)
- Thought leadership platform creation/promotion generated 6 speaking engagements, 3 articles, and an exponential increase in social media engagement.

MINIMUM PROJECT ROI (1ST YEAR):

\$518,000+