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**Marketing and Business Development in the New (anything but) Normal**  
Essential Strategies and Technology Your Firm Needs to *Survive Thrive*

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1

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- 15+ years of experience working together with more than 300 top firms
- Experienced presenter on Technology, Marketing & Business Development topics
- JD Supra Readers Choice Award-winning author
- Fellow, College of Law Practice Management
- Team of more than 100 professionals
  - CRM Success consulting
  - Outsourced data quality and enhancement
  - Competitive intelligence



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2

**Today's Agenda**

- The #NewNormal
- Strategies for developing business in the #NewNormal
- The importance of technology during #NewNormal
- The Future: what's the next #NewNormal
- Q&A
- Final success tips


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3

**Our #NewNormal**

- Mask, social distancing, vaccines...
- Remote work
  - Deluge of conference calls
  - WebEx / Zoom...
    - and more WebEx / Zoom...
    - and more WebEx / Zoom
  - Sharing space with family members...
    - And kids being home schooled...
    - And our pets...



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**The New Conference Room**



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**Our Clients' #NewNormal**

- Many clients are still dealing with a number of issues
  - Closed or partly open businesses / offices
  - Working from home
  - Staff layoffs / realignment
  - Significant losses of revenue
  - Navigating loans
  - Federal and state tax issues / credits
  - Personal or family illnesses
- A great deal of uncertainty about the future

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## Client Issues Based on Impact

- Companies hardest hit
  - Hotels, travel, entertainment, arts, restaurants, health clubs, salons, religious institutions, education
- What they may need
  - Assistance with aid/PPP and other loan packages and forgiveness
  - Help reforecasting budgets, tighter cash management strategies, evaluating the collectability of accounts receivable, trimming expenses



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7

## Client Issues Based on Impact

- Companies benefitting
  - Hospitals, medical practices, health care supply chain, ventilator manufacturers, food supply chain, paper goods, technology providers, streaming services, cleaning companies, anyone supporting remote work
- What they may need
  - Help budgeting, forecasting and identifying the right level of variable and fixed-cost investments to make
  - Introductions to others in your network to help them grow
  - Relationships with bankers, lawyers, advisors



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## Our Current Challenges

- Inability to reach key clients and other contacts due to lack of technology or bad data quality
- Inability to identify relationships
- Limited access to information
  - Can't ask assistants for help
- Lack of coordination
  - Multiple people reaching out the same individuals with different messages and no way to track contacts
- Not enough hours in the day



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9

## Our Current Challenges

- Data Quality
  - Incorrect or incomplete contact data
  - Duplicative data or data entry
  - Disconnected silos of data
  - Incomplete business and industry data
  - Bad lists



10

## Successful Law Firm Business Development in the #NewNormal

- Reaching out regularly
- Help, don't sell
  - Make personal connections
  - Ask questions to gather information so they can learn how best to help them
  - Provide information
  - Answer questions
- Execute a "digital first" strategy
- Offer 'gifts' or 'ins'



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11

## 'Gifts' & 'Ins'

- Share information, invitations ideas including
 

<ul style="list-style-type: none"> <li>□ Best practices</li> <li>□ Consultations</li> <li>□ Evaluations</li> <li>□ Stories</li> <li>□ Links</li> <li>□ Forms</li> <li>□ Deadlines</li> <li>□ Resources</li> <li>□ Referrals</li> </ul>	<ul style="list-style-type: none"> <li>□ Articles</li> <li>□ Blog posts</li> <li>□ Reports</li> <li>□ Infographics</li> </ul>
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12

## Successful Law Firm Business Development in the #NewNormal

- Authenticity and empathy are critical
- Ask questions to identify needs
- Consider phone vs. email
- Efforts must be coordinated
- Technology will be essential to success



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13

## CRM

- A database of information for clients and contacts
- Mailing list and event management
- Activities to track key interactions
  - Meetings, calls, email
  - Events, sponsorships
  - Meals /entertainment
  - Coordinate outreach
- Categorizations for targeting



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## eMarketing

- Target communications and invitations
- Track related activities
- Identify leads based on interests
- Analytics to track who is engaging with email communications, invitations and website



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## ERM

- Creation of contacts from email signature blocks
- Identification of relationships / who knows whom
- Gauging relationship strength
  - Identifying the best relationships for outreach



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16

## Pipelines

- Organize and visualize the business development process to track
  - Opportunities
  - Leads, prospects
  - Pitches, proposals, RFPs
  - Win / loss rates
- Identify business development sales cycle times
- Keep opportunities moving forward
- Enhance follow up
- Foster accountability
- Predict and enhance revenue
- Improve performance
- Predict future growth and revenue flow



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## Additional Essential Technology

- Experience systems
- Proposal generation
- Conferencing / webinars
- Podcast platforms and tools
- Video platforms and tools
- Social media
- CI
- Transcription tools



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### The Good News

- There are a lot of new tools and options available
- You don't have to break the bank to succeed



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### The New #NewNormal: What's Does the Future Look Like



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### The Crystal Ball

- Limited returns to the office
  - WFH is here to stay
  - Reductions / redesigns in office space
  - Staffing changes to focus on new needs
- Marketing becomes a mix of digital and in person
  - Digital and email will be in high demand
  - More webinars and a few in-person events
  - New hires with MarTec experience
  - Focus on lead general
  - The basics of client service don't change



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21

### What's Changing

- Generating Leads Pre-pandemic
  - Speaking opportunities
  - Conferences
  - Writing for publications
  - Site visits
  - In person pitches
  - Cocktail parties
  - Alumni events
  - Sporting tickets, boxes
  - Adding business cards to email lists



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### What's Changing

- Generating leads post-pandemic
  - Website subscription forms
  - "Gated" website content
    - Articles / white papers / eBooks / infographics
  - Social media
  - Blog posts
  - SEO / SEM
  - LinkedIn / social posts
  - LinkedIn / Facebook ads



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### What's Changing

- Sponsorships

**Sponsorship Budgets Set to Plummet in Response to COVID-19**

All sizes of law firms are planning to de-emphasize sponsorship marketing in the wake of COVID-19. On average, 62% of the respondents stated that they intended to reduce sponsorship budgets.



Gross Revenue Group (In USD)	Percent of Firms
Under 50M USD	95%
50-100M USD	67%
100-200M USD	83%
200-500M USD	79%
500M-1B USD	83%

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## What's Changing

- In person events**

**In-Person Events Will Be De-Emphasized, but Remain a Significant Part of Firms' Marketing Mix**

Not surprisingly, the responding firms have already decided to reduce their reliance on in-person events in the wake of COVID-19. But they were far from unanimous on how far this reduction will go. Forty-six firms stated that they anticipated reducing their number of planned events by 50% or more, but 49 more firms foresee much smaller reductions — 30% or less. Despite COVID-19, it appears that in-person events remain an essential part of the responding firms' marketing mix.

Predicted Percent Reduction in Events	Number of Firms
10% or less	9
10-20%	19
20-30%	21
30-40%	11
40-50%	19
50%+	46

25

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## What to Do: Succeeding in the #NewNormal

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## How Smart Firms Are Adapting

- Commit to digital**
  - Research tools / systems / software
- Focus on data quality**
  - Go through Outlook contacts
  - Deduplicate contacts and lists
  - Research/remove bounces
  - Update/enhance contact info
- Categorize contacts**
  - Add industries to target
  - Identify former clients to reach back out to
  - Determine which clients need which kinds of help
- Set and assign follow up tasks and activities**
- Coordinate efforts with technology**
- Leverage attorneys' new need for technology**

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## Focus on Content

Create / Enhance / Distribute & Share

- Webinars with relevant insights**
- Explore podcasts / videos**
- Provide free consultations in essential areas**
- Offer free trainings or courses for CLE**
- Share research reports**
- Spend time on social media sharing ideas, posts, articles**
  - Repurpose content
  - Produce podcasts or videos using Zoom or other tools

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## Additional Tips for Getting Ahead in #TheNextNormal

- Leverage technology**
- Reach out for help**
  - Consultants
  - Software providers
  - AALA friends and colleagues
  - LMA resources
- Reach out to help**
  - Don't forget the Ins / Gifts

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# Q / A

30

## My Ins / Gifts for You

- Complimentary
  - CRM growth cycle infographic
  - Datanalysis
  - CRM / Marketing technology assessment




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31

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32

## Final Takeaway

By leveraging technology and adopting the most effective processes during this time, attorneys can build a foundation for more effective client relationship management that will serve them well now - and help them gain an advantage during the recovery that we are all so eagerly awaiting.


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33