

## PROFESSIONAL DEVELOPMENT

## Adding Value With a Client Visit Initiative

By Brook W. Redmond and  
Ali C. Ferro

The increasing competition in the legal industry highlights the importance of differentiation and adding value beyond the work product. Face-to-face interactions with clients are a critical component in differentiation because they provide the opportunity to understand better the nuances of clients' businesses, develop deeper relationships, and drive productive collaboration.

Under this guiding principle, Baker Donelson spent the past five years emphasizing the important role client visits play in providing exceptional client service. In response to the realities of the legal industry, including changing market dynamics and increased competition, the firm was determined to put a more singular focus on in-person client interactions.

Toward that end, in 2016, Baker Donelson launched a Client Visit Initiative that leveraged training, software, and gamification and resulted in visits to more than 2,650 clients. The in-person interactions afforded the attorneys a deeper understanding of the clients'

*continued on page 5*

## Showcasing Attorney Expertise: Guidance for Law Firms

By Cindy Sharp

Many attorneys already share intellectual capital by writing articles or delivering presentations with the hope of attracting additional business. However, most individuals, and even firms, have not developed a cohesive plan to ensure maximum exposure.

*Marketing the Law Firm* has previously published my articles relating to creation and implementation of successful content marketing programs. If interested, check out *Thought Leadership Initiative: A Road Map for Law Firms*, in the March 2016 issue of MLF (<http://bit.ly/2oalTQg>) and *Engaging Lawyers in a Profitable Speaking Initiative* in the March 2017 issue (<http://bit.ly/2oedxa6>).

### FIRM-SPONSORED EDUCATIONAL EVENTS

Indeed, speaking at programs offered by bar associations and trade groups helps attorneys build a robust professional brand and develop relationships. However, firm-sponsored seminars or workshops can have an even greater impact. The firm controls the message, targets the audience and can schedule multiple sessions over the course of a year.

In this article, I dig a little deeper into the arena of self-sponsored educational programs and events. Consider whether any of the following approaches should be included this year as a component of your law firm's marketing plan.

### EDUCATIONAL SEMINARS FOR CLIENTS, PROFESSIONALS AND FRIENDS OF THE FIRM

By way of background, I built and sold my interest (after close to 30 years in practice) in a boutique estates and elder law firm and have personally tried almost every technique that I recommend to my law firm clients, including those outlined below.

*continued on page 2*

### In This Issue

Showcasing Attorney  
Expertise . . . . . 1

Prof. Dev.: Client Visit  
Initiative . . . . . 1

Marketing Tech:  
Finding a Few More  
Minutes for BD . . . . . 3

Leadership: Sexual  
Harassment &  
The Legal Industry . . . 6

Sales Speak . . . . . 7

PRESORTED  
STANDARD  
U.S. POSTAGE  
PAID  
LANGHORNE, PA  
PERMIT 114

## Showcasing

continued from page 1

### CLIENT APPRECIATION SEMINARS

Each quarter, my marketing assistant invited all estate planning clients to a two-hour evening seminar held at a local conference center. Clients were encouraged to bring their friends and relatives, as long as they pre-registered. We served only coffee, tea, water and dessert as our focus was on the program. The schedule was naturally pre-planned a year in advance and was treated as a series. For example, I offered an annual session specifically geared toward executors and invited the clients to bring designated fiduciaries to the session. We normally attracted approximately 40 guests per quarter, which allowed us to continue cementing relationships and asking for referrals.

If your firm's venue is large enough, you may wish to host seminars in-house. Hosting programs on your own turf gives you the opportunity to show off your beautifully appointed office space. Inviting potential and existing clients to be a guest in your "home" can also lend a congenial feel to the relationship, especially if trained staff are on hand to extend a warm welcome.

### WORKSHOPS FOR PROFESSIONALS

Sponsoring quarterly continuing education sessions for professionals who are potential referral sources is another worthwhile undertaking. Participating lawyers are branded as "in the know" and the firm benefits provided that the sessions are held on a consistent basis — year after year.

Again, the event can be held either at an outside venue or inhouse.

Business development strategist and veteran attorney **Cynthia Sharp** served as Dean of the Speaker's Academy of the Philadelphia National Speakers Association. She helps attorneys generate more revenue for their law firms and may be reached at [cindy@thesharperlawyer.com](mailto:cindy@thesharperlawyer.com).

Even firms with limited space can host workshops (with or without CLE credits). After all, a small conference room can accommodate five or six professionals for a "Lunch and Learn" or "Executive Breakfast." Small groups allow the presenting attorney to connect more deeply with each individual, which should be one of the major objectives.

### FULL-DAY CLE EVENT

For the past 14 years, Kansas City, MO firm Shook Hardy & Bacon has sponsored a full-day CLE program designed to attract lawyers in their locale. Touted as an update of the law session, the firm showcases a variety of the law firm's attorneys as featured speakers for a full-day event in a top-notch venue. In 2014, the firm retained me as the opening speaker and I was informed that 600 lawyers were expected to attend in person and that the webcast would have a broad reach.

As I mingled with the sea of attendees in the luxury hotel (with fabulous and plentiful food), I realized that Shook Hardy had created a cadre of "raving fans" — ambassadors and referral sources all rolled into one. The event attracts firm alumni, solo practitioners, in-house counsel and lawyers from other large firms. People told me that they look forward to attending every year for the excellent programming as well as the networking opportunity.

I wouldn't recommend sponsoring an all-day program until you have a few smaller events under your belt. However, once processes for shorter programs are memorialized, why not scale up and put on a larger event? Certainly, an event of the magnitude described in this section is a significant financial investment and strains both participating staff and attorneys. However, it is a safe bet that Shook Hardy & Bacon has realized measurable (as well as immeasurable) results from this annual initiative. Otherwise, it is unlikely that the firm would have continued holding the event for the last decade and a half.

continued on page 4

# Marketing The Law Firm®

EDITOR-IN-CHIEF . . . . . Kimberly Alford Rice  
EDITORIAL DIRECTOR . . . . . Steven Salkin, Esq.  
GRAPHIC DESIGNER . . . . . Rajnish Kumar Ranjan

#### BOARD OF EDITORS

SHARON MEIT  
ABRAHAMSON . . . . . Foley & Lardner LLP  
Miami  
BRUCE ALLTOP . . . . . LawVision Group LLC  
Boston  
MARK BEESE . . . . . Leadership for Lawyers  
Evergreen, CO  
LARRY BODINE . . . . . LawLytics.com  
Tucson, AZ  
JOHN BUCHANAN . . . . . Scott Cole & Associates  
Oakland, CA  
ALLAN COLMAN . . . . . The Closers Group  
Torrance, CA  
BETH MARIE CUZZONE . . . . . Goulston & Storrs PC  
Boston  
NICHOLAS GAFFNEY . . . . . Zumado Public Relations  
San Francisco  
JOHN HELLERMAN . . . . . Helleman Communications  
Washington, DC  
VIVIAN HOOD . . . . . Jaffe  
Jacksonville, FL  
ARI KAPLAN . . . . . Ari Kaplan Advisors LLC  
New York  
MARCIE BORGAL SHUNK . . . . . The Tilt Institute LLC  
Houston

Marketing The Law Firm® (ISSN 0893-7788) is published by Law Journal Newsletters, a division of ALM. © 2018 ALM Media, LLC. All rights reserved. No reproduction of any portion of this issue is allowed without written permission from the publisher. Telephone: 800-756-8993;

Editorial e-mail: [wampolsk@alm.com](mailto:wampolsk@alm.com)  
Circulation e-mail: [customercare@alm.com](mailto:customercare@alm.com)  
Reprints: [www.almreprints.com](http://www.almreprints.com)

POSTMASTER: Send address changes to:  
ALM  
120 Broadway, New York, NY 10271

Published Monthly by:  
Law Journal Newsletters  
1617 JFK Boulevard, Suite 1750, Philadelphia, PA 19103  
[www.ljonline.com](http://www.ljonline.com)



## Finding a Few More Minutes for Marketing And Business Development

By Ari Kaplan

Years ago, when trying to improve some of my snacking habits, I stopped buying cookies, candy and savory chips. Magically (and perhaps obviously), I quickly found that I ate less junk food. In effort to find a few more minutes a day for marketing, I recently applied this same basic, but effective, technique to my time management and the results have been just as immediate.

Similar to the many professionals I coach, time is my universal excuse for skipping business development. That said, I recognize that if I don't spend the time focusing now, I will spend too much of it worrying later. So, at the beginning of the year, I conducted a self-assessment and realized that I waste a few minutes a day (ok, maybe longer) reading the news.

Be honest — you occasionally (routinely) do this, too. You're in the middle of a project and decide to briefly visit a favorite source of online information. All of a sudden, you are engrossed in minutiae traveling down a circuitous route of complete distraction. For example, I might read about a football game and then wonder when the stadium was built. So, I casually

---

**Ari Kaplan** is a legal industry analyst with Ari Kaplan Advisors. He provides legal technology-related independent market research, and sales training for those focused on reaching law firms. For a video tutorial on implementing inbox zero from his software platform, <http://www.Lawcountability.com>, please e-mail [Ari@AriKaplanAdvisors.com](mailto:Ari@AriKaplanAdvisors.com).

investigate the facility's history on Wikipedia. I might find some odd details about arena naming rights and continue my research odyssey until 30 minutes have evaporated and a series of calls consume the remainder of my day, leaving no time for my objective.

### ENJOY THE BENEFITS OF BLOCKSITE

To combat this problem, I noted a list of websites that I visited most often to feed my need for distraction and procrastination. Then, I blocked them. Period. I found a browser plug-in named BlockSite and began adding URLs, such as [NYTimes.com](http://NYTimes.com), [Yahoo.com](http://Yahoo.com), and [News.Google.com](http://News.Google.com), among others, to it. Now, every time I have the urge to check the news during the day and instinctively try to visit one of those sites, it is blocked. What is interesting about this experiment is that I don't actually unblock the site. In fact, my demand for information seems to be satisfied by simply trying, rather than succeeding.

The result is that I have found an extra 10 or 20 minutes a day, which may not sound like a lot of time, but over the past year, I have polled various groups of lawyers whom I have had the privilege of training about the amount of time they spend on marketing and business development each week. The majority spend less than an hour a week on these activities so if I exceed 12 minutes a day, I'm performing at a higher level than most.

If you don't think eliminating distracting websites will work for you, there are a number of other simple techniques you can implement to find a bit more time in your day.

### TRY TWO CALENDAR TRICKS

I am a zealous time blocker. Whenever possible, I dedicate mornings for creative work or drafting. This time also includes speaking with my assistant about marketing and business development projects

that I often overlook. Committing time in this way is critical because I use an auto-booking calendaring tool called [YouCanBook.me](http://YouCanBook.me), which I learned about from Procertas founder, Casey Flaherty. This free tool has changed the way I schedule meetings, set phone calls, and generally organize my day.

Anyone can book time on my calendar without confirming first. If the time slot is open, I'm available. I save countless minutes every day by not corresponding about meeting dates and times. Of course, every so often I need to reschedule something because of my side job as an Uber driver (to my kids) or for a last-minute conflict. In general, however, it is a flawlessly transformative system.

### GET EVEN WITH EMAIL

Although I have not completely tamed the email beast, I have taken two steps to minimize it. First, I subscribe to the theory of inbox zero. At the end of every day, my inbox contains no email messages because I have either responded, deleted, or added something on which to follow up to my calendar. Since I no longer use my inbox as a task list, I am exponentially more responsive and more likely to capture new opportunities more quickly.

I also no longer stress about responding to people, which is very refreshing. In fact, ever since I interviewed Jeena Cho for my podcast about her book, *The Anxious Lawyer: An 8-Week Guide to a Happier, Saner Law Practice Using Meditation* (which you can listen to at <http://bit.ly/2nKfZ7Z>), I have been trying to incorporate meditation into my schedule. While I have routinely struggled with this, I have finally found a technique that works.

Like many of my peers, I use my phone as an alarm clock. As a result, I have developed the unhealthy habit of checking it as soon as I

*continued on page 4*

---

## Marketing Tech

*continued from page 3*

wake up. To address this, before satisfying the urge to read my email or text messages, I write in a journal.

I follow the morning pages method Julia Cameron describes in *The Artist's Way* of writing for a few minutes about anything that is on my mind. Although the entries almost always begin with some lament about my lack of sleep, each prompts me to list upcoming tasks for the day and an outline for accomplishing

them. Often, when I'm done, I'm not very interested in checking my phone. And, the writing process is actually quite meditative.

### DICTATE

I am a fan of the instant dictation feature available on both my Mac and my iPhone. In fact, I dictated the first draft of this article on a stationary bike (which may account for its quality so I'm grateful that you've kept reading). I am even in the process of writing a new book, which I will dictate as often as possible.

I adopt whatever method allows me to produce content, preserve time for marketing and business development, accomplish most of what is on my to-do list, and maybe have a little fun. Productivity has become a game of trying to add a few minutes into each day, which I'm slowly winning. But, please, no prizes, especially dark chocolate Hershey's Kisses or crunchy Cheetos, I'll eat the entire bag in one sitting and get nothing done.



---

## Showcasing

*continued from page 2*

### FORWARD THINKING LAW FIRMS

Many have leapt further ahead of the game, having created their own virtual platforms through which they can easily update clients and prospects with respect to current legal developments. In the course of researching this article, I ran across the website for Duane Morris Institute, which offers programs at "client work sites" and online." Attention is drawn to this particular initiative as it is an example of a firm that has, and continues to make, a serious investment in showcasing the expertise of its lawyers.

### COLLABORATIONS

As practice groups create an annual marketing calendar, consider collaborating on at least one session with a co-partner who serves the same segment of the market. Attendees benefit because multidisciplinary events offer broad context for the legal issues. The lawyer and law firm receive increased exposure as the session will be promoted to the database of the co-partner.

By offering a session together, the relationship between the attorney and other professional deepens, which should lead to referrals. If the event goes well, why not submit a proposal to various associations that will give the speaking duo even more exposure?

Naturally, the most powerful collaborative co-partner could be another attorney within the same firm who practices a different discipline. By encouraging professionals in different departments to work together on a project, we are playing a part in the organic development of a potentially fruitful cross referral relationship.

### PRACTICAL CONSIDERATIONS

#### Logistics

As you begin to formulate your marketing plan, keep these suggestions in mind:

- Map out the event calendar for the entire year. Most importantly, choose the dates so that the calendars of all stakeholders may be reserved. Naturally, flexibility as to the scheduling as well as the topics will be necessary.
- Seek accreditation to offer CLE credits to professionals for whom you wish to sponsor a program. Because ethics credits are less frequently offered, including an ethics session generally increases attendance. An option is to develop a relationship with a private CLE provider, especially if your state does not extend CLE credit for in-house programs.
- Create a written process with a step-by-step checklist for each type of event. Refer to it each and every time that a program is offered to avoid

unnecessary errors. Capturing detailed information will save time of "reinventing the wheel" as the marketing department plans new sessions.

### LEVERAGING THE EVENT

Savvy legal marketers are well aware that the event itself is only one phase of the business development process. A few suggestions that can be easily implemented are to:

- Ask the presenting attorneys to provide a 300-word summary of the key points made at the session. The summary provides the foundation for: a) writing a short blog about the content of the program; b) creating a press release to be posted on your website, distributed to your press contacts as well as select contacts on your database; and c) social media posts.
- Provide attendees with a menu of appropriate courses that your firm attorneys offer to members of associations to which they belong or even to employees of their company.
- Create evaluations that are completed by your guests before adjourning the workshop or educational session. Asking for completion on the spot will result in a higher rate of return than if you wait and

*continued on page 5*

---

## Showcasing

continued from page 4

send an online survey. Consider including the following questions:

- What was the most useful part of today's program?
- Are you likely to apply any of the information or to share it with your colleagues?
- Was there any part of the program that you didn't like? If so, please describe.
- What topics would you like us to address at future workshops?
- Do you know of any organization or association that would benefit from the information presented today?
- Are you interested in having one of today's speakers present an in-house educational session at your business location?

Devise a Self-Evaluation Process. As we seek to improve upon our experiences, it is critical to outline

specific criteria upon which to rely in order to determine whether the event was successful. Criteria could include: a) Percentage of invitees who actually attended; b) Feedback from evaluations; c) How many guests brought their own guests; d) Spin off presentations generated; and e) New matters.

### **Presentation Skills**

Plan and facilitate an in-house speaker training session, which may qualify for CLE credit depending upon the applicable regulations in your jurisdiction. Encourage firm attorneys who have proved themselves on the platform to attend in addition to those who are novices. A seasoned perspective will add to the overall experience. Even veteran speakers may pick up a new technique or two.

A comprehensive training session would include consideration of various speaking contexts. For example, preparing and delivering a "solo" presentation differs from

participating on a panel or online event. Particular emphasis should be given to the art of audience engagement and subtle persuasion as well as on how to identify and succinctly articulate the core message. Email me at [cindy@thesharperlady.com](mailto:cindy@thesharperlady.com) if you are interested in reviewing the curriculum of the program that I personally offer entitled "Essential Speaking Skills for Attorneys".

### **CONCLUSION**

Lawyers and leadership willing to invest in an initiative under which the firm creates speaking opportunities through self-sponsored sessions will reap financial benefits if a sound plan has been designed and is properly implemented. As with any other marketing endeavor, persistence and consistency are key.



**FOLLOW US ON  
TWITTER!**

[http://twitter.com/ljn\\_online](http://twitter.com/ljn_online)

---

## Client Visits

continued from page 1

goals and personal interests. They also provided opportunities to enhance service delivery based on the feedback the clients shared. Firms of any size can apply the fundamentals of this Client Visit Initiative to enhance the value they provide to clients.

### **GETTING STARTED**

The key driver for the client visit initiative was for attorneys to

---

**Brook Redmond** is the Director of Business Development at Baker Donelson who works with and coaches attorneys to increase business-development acumen. She may be reached at [bredmond@bakerdonelson.com](mailto:bredmond@bakerdonelson.com). **Ali Ferro** is a Business Development Manager at Baker Donelson where she facilitates business-development training programs. She may be reached at [aferro@bakerdonelson.com](mailto:aferro@bakerdonelson.com).

increase the number of meaningful face-to-face interactions with clients outside the course of normal business. That focused the firm's efforts in three areas: 1) increasing the frequency of client visits; 2) improving the quality of those interactions; and 3) tracking the visits to better support follow up.

**Increase the frequency of client visits.** When attorneys spoke about the frequency of their in-person interactions with clients, many referenced depositions, trials or closings. By defining a visit through the lens of the client — a meaningful face-to-face interaction outside the course of normal business — the attorneys reevaluate the frequency and the client's perception of their in-person visits.

**Improve the quality of these interactions.** The firm emphasized that the purpose of the visits is to gain a deep understanding and appreciation for clients' goals, communication preferences and unmet

needs. In advance of the visits, the firm's business development team provided attorneys with succinct research dossiers and a handful of open-ended questions, and coached them to listen for opportunities where the firm could add value. The preparation bolstered the attorneys' confidence, provided greater comfort to ask probing questions and allowed them to actively listen to clients' responses.

**Create a clear and trackable lead measure.** Many are familiar with the well-known concept, "What gets measured, gets done." While some argue its origin and relevancy, Baker Donelson applied the principle that consistent measuring and reporting improves focus and execution for this initiative. Tracking client visits allowed the firm to:

- Ensure attorneys extended the conversation during the visit through to specific and valuable follow-up;

continued on page 8

## No Immunity: Sexual Harassment & The Legal Industry

By John Hellerman

For members of a conservative industry that — literally — wrote the rulebook on sexual harassment, law firms need to be ready for a day of reckoning that seems inescapable (and may have already happened by the time this article is published). Right now, the focus is on Hollywood, mass media, Wall Street, Silicon Valley and politics, which are all professional arenas historically known to operate by their own set of rules that have been at equal turns brushed off as socially acceptable, emboldened after career-ending threats kept censure at bay, and vigorously defended in a courtroom. But the very shaky reality is that the lawyer standing beside every Kevin Spacey, Matt Lauer, Harold Ford, Jr., Travis Kalanick or Al Franken is most likely operating from his or her own ‘house of cards.’

The sad fact is that no industry has ever been immune from sexual harassment issues. For legal professionals, the industry rumor mill suggests an accuser typically doesn’t survive an accusation when the accused is a rainmaker. More commonly, the accuser is offered a settlement in exchange for signing a non-disclosure agreement and leaving quietly or, in some cases, decides to suffer in silence when faced with choices that for personal or professional reasons might prove debilitating.

Recent headlines would lead us to believe that those days are numbered. But law firm rainmakers

---

**John Hellerman** is the President of Hellerman Communications, positioning professionals to win business and navigate crises. He can be contacted at [jhellerman@hellermanllc.com](mailto:jhellerman@hellermanllc.com).

are still seen as unicorns: rare and highly revered for their seemingly magical powers to win and retain business. Their efforts don’t just feed their pride and their pockets; they support an entire — albeit fragile — ecosystem. Practices, budgets, hiring decisions, satellite offices and firm reputations are built around these individuals. There is seldom an immediately feasible or fiscally comparative Plan B.

So, in the age of social media when one tweet — re-tweeted exponentially — often sees people convicted in the court of public opinion before facing charges in a court of law, today’s environment looks grim for both the accuser and the accused, as well as the rest of those who exist in their orbit.

Is it possible — is it appropriate — for your firm to prepare itself by striking a respectable balance between creating a safe space for alleged victims to bravely come forward and executing a thorough investigation into allegations, while protecting its present and future business for the employees and clients not immediately involved in the situation? Are you prepared for when a client refuses to continue working with your firm because of the situation? What happens if a client is involved? What happens if the allegations are levied by someone at your partner’s former firm?

### CULTURE

A firm’s culture is central to how it avoids negative situations and/or handles them when they arise. Whisper campaigns that warn against being alone in the room with Employee X or enable behavior by suggesting “that’s just how Employee Y is” are often open secrets. Personnel files might prove to contain multiple infractions past and present that were “dealt with” through a slap on the wrist, the suggestion (but no enforcement) of counseling, or a simple “don’t do that again.”

Forced social interactions to build relationships and a book of business

can provide ready-made opportunities for potential misconduct. But those examples are within the firm itself. Add in the traditions of “winning and dining” clients to win business, combined with the pressure to keep it, and there would be few in the legal industry who couldn’t tell a story or two of when the line for “acceptable” behavior was crossed.

Instituting a zero-tolerance policy for inappropriate conduct — and clearly defining what that means — is a start. Requiring regular harassment training for all employees is another critical step in the right direction, as is ensuring those responsible for human resources are adequately trained to receive and process complaints.

It’s also important to know when to involve an independent resource (e.g., an anonymous hotline or outside investigator) to guarantee situations are handled without perceived or real bias. But, all the preventative measures in the world aren’t guaranteed to stop every future infraction and they certainly can’t go back in time and erase infractions of the past.

### COMMUNICATION

It would be foolish to discount recent proof that power and position are proving no match for social media, which immediately amplifies every thought, action, and reaction for anyone at any time in any place. It is critical that firms have a strategic communication plan in place that outlines how to execute the rapid release of reliable information to both internal and external audiences. It needs to include a method to receive questions, an anticipated schedule for updates, and a statement about established policies related to the situation.

Failing to respond swiftly with credible facts and appropriate sentiment almost guarantees an irretrievable loss of message control, setting off a chain of events that could sink an entire firm and its workforce — most of whom will have had no knowledge or participation in the situation that ended their current career.

*continued on page 7*

## Zombies, Stamping Horses and the King of Prussia

### *Business Development Leadership*

#### *Part One of a Two-Part Article*

By Allan Colman

If you were hoping I would define leadership for you, I can't. What we will address includes zombies, stampeding horses, a former King of Prussia and how they fit in with the six primary elements of exceptional leadership.

In our book, the *Crazy Impact of Leadership*, Rick Justus points out that the most often overlooked leadership task is leaving a legacy for the organization — an impact for the future. He calls it "crazy" because most leadership programs and texts forget this key contribution of a real leader. In fact, Steve Jobs described his goal, when Apple began, as building "insane new products."

Now, why can't I define leadership for you? I keep going to the well looking for a definition from the experts and here's what I've found:

1. In a recent backlogofbusiness blog, there was a great article about "Leading into the Future." It addresses the ever-

---

**Dr. Allan Colman**, CEO of the Closers Group and a member of *Marketing the Law Firm's* Board of Editors, specializes in accelerating rapid revenue growth for law firms. He may be reached at [www.closersgroup.com](http://www.closersgroup.com).

## *Sexual Harassment*

*continued from page 6*

It might be cliché, but we are living in unprecedented times. Those who authored, defend and prosecute under the current rules of conduct are undoubtedly looking

changing business landscape, the need to train your teams for the future, keeping your workforce informed, being transparent, helping them to understand your vision and keeping your workforce fully engaged. It sounded great until the blog page ended with a large advertisement: "POTTY TRAIN YOUR DOG IN 6 DAYS." I won't give you the author's name.

2. While continuing to search for a definition of leadership, I researched what others identified as major leadership keys. One said: "MAKE IT A STRONG HAPPY TEAM." Another called for "Freedom Based Leadership." Reading the definition makes it sound like herding cats.
3. Here's another of my favorites, "SIMPLY FEEL GOOD ABOUT YOURSELF."
4. How about this one: "THINK OF YOURSELF AS BEING THE SUN," quoting astronomer Kepler in her definition.
5. I ended my search when coming across this quote from Jack Welch, GE's former boss: "KNOW THAT WEEDS BECOME DEAD WOOD."

Is it any wonder I can't define leadership? However, I can relate to you the components of exceptional leadership and how to leave your own Crazy Impact. Through my work as a chief executive, speaker and advisor to managing partners, agency administrators, etc., here are the six skill-sets that are each crucially linked in order to make an impact. They are:

1. Leaders listen;
2. Leaders make decisions;
3. Leaders communicate;

at their own behavior, as well as those around them, thinking "Who's next?" Indeed, the current landscape now makes it imperative for firms to strengthen their policies and reaffirm their lack of tolerance for anything that does not enhance the lives of their

4. Leaders hold people accountable for results;
5. Leaders take risks; AND
6. Leaders leave a legacy.

The analogy most fitting is that of an orchestra leader. "To be successful they must turn their backs on the audience." (James Crook) Think about attending a symphony orchestra performance and the experience of bringing a diverse group of instruments together. Such a performance can serve as a reminder of how amazing things can result when various elements work together for one outcome.

Nevertheless, there is something larger that you can take from the experience — an understanding of the importance of a strong leader. Consider this: While an orchestra's conductor does not play an instrument, she or he is arguably the most important member of the symphony. After all, the conductor is responsible for ensuring that each player knows his or her part and for delivering a polished presentation to the audience.

Some professionals feel out of tune in their efforts to make decisions and have them implemented. It is crucial to remember, however, that leadership is a highly-focused activity that must be internally orchestrated.

You must decide which advice to take, determine which of the available tools and strategies will work, assign implementation tasks, hold people accountable, weigh the risks, and consider the impact on a future legacy. My future articles will address these exceptional leadership tasks in detail.

Not to leave you guessing, Tom Ziglar refers to employees as "zombies." We will put them all in context next time.

—❖—

staff or provide a stable, trusted environment for client work to flourish.

Smart firms understand that it all starts with having a plan to encourage communication and transparency — on every level.

—❖—

## Client Visits

continued from page 5

- Provide targeted support of attorneys' efforts to grow client relationships;
- Improve internal collaboration by connecting subject matter experts across practice groups and offices;
- Identify industry trends and proactively contact other clients in those industries to inquire about the trending needs;
- Tie these activities to firm performance; and
- Cement the importance of client visits in firm's culture.

### IMPLEMENTATION

Baker Donelson launched the initiative in three phases. Starting in January 2016 with a single department as a pilot group, the first phase took six weeks from conception to launch. To ensure attorney engagement, the firm developed a competition among the department's practice groups and provided fun prizes as incentives. A simple form on the firm's intranet where attorneys or their assistants could log visits, which then fed a comprehensive database of client visits, provided a tracking system that was reliable, easy to access, and user-friendly. The department chair set an initial goal of 1,000 client visits, which equals about six visits per attorney over 12 months. The communication plan utilized the department chair's existing weekly email to keep the initiative top of mind and drive competition.

Attorneys responded enthusiastically by logging visits immediately. The weekly email updates included a resource document with tips to prepare for visits, a chart depicting each practice group's progress and

notes highlighting individual attorneys who collaborated on visits to provide exceptional value to clients.

The practice group leaders drove competition by commenting regularly on their group's standing. Six months into the pilot program, the department chair declared a "Client Visit Day," which resulted in 83 client visits. At year's end, the department members' client visits totaled 1,270. The stories attorneys shared about what happened during their visits sustained momentum — many found that when they visited their clients' offices, they took the opportunity to address their clients' questions in real time and identify unmet needs, which led ultimately to new engagements.

Given the pilot program's success, Baker Donelson replicated the initiative across all departments. The firm's top leaders launched the program, noting the significance of the initiative and the importance of logging client visits to ensure supported follow up. With the positive feedback, they continued to provide regular updates through email and during meetings on the number and quality of visits.

Once the initiative expanded to the entire firm, attorneys provided helpful feedback that highlighted the need for additional resources. Attorneys requested "on-the-go" access to resources to support client interactions in real time.

Over the course of five months, the firm created an iOS app that houses important firm information, including example questions to ask clients, answers to common client questions, and sample pricing proposals. The app's features allow attorneys to log client visits and submit their corresponding expense reports to achieve greater efficiencies.

In April 2017, Baker Donelson launched the app firm wide with a brief instructional video and user guide. The attorneys welcomed the efficiencies afforded by the app and the firm's leaders encouraged its use in their communications about the initiative.

### STARTING YOUR OWN INITIATIVE

Firms looking to engage their attorneys in similar client-facing initiatives should consider incorporating the following elements in their strategies:

- Keep the voice of the client in the room as you create, plan, launch and refine the initiative.
- Identify the goal, possible obstacles and ways to address them.
- Work with firm leaders to ensure they value the goal, agree with the approach, and are willing to serve as champions.
- Look for ways to tap into attorneys' inherent competitive drive to motivate and engage them.
- Leverage in-house resources to track, measure and report on the progress and success of the initiative.
- Communicate on the progress towards the goal at regular intervals to keep it top-of-mind with participants and to emphasize the importance of reaching the goal.
- Seek feedback from the participants about ways to improve the initiative and continue to refine your approach.

—❖—

The publisher of this newsletter is not engaged in rendering legal, accounting, financial, investment advisory or other professional services, and this publication is not meant to constitute legal, accounting, financial, investment advisory or other professional advice. If legal, financial, investment advisory or other professional assistance is required, the services of a competent professional person should be sought.

To order this newsletter, call:  
800-756-8993

Law.com subscribers receive a 30% discount  
on this publication.

Call 877-807-8076 for information.

On the Web at:  
[www.ljnonline.com](http://www.ljnonline.com)