MAY/JUNE 2018

Strategies

THE JOURNAL OF LEGAL MARKETING

RISING TO POSITIONS OF INFLUENCE

Discover Ways to Grow Yourself and Your Team

Engaging the Millennial Lawyer With Legal Project Management

Key Findings From the 2018 Joint LMA/Bloomberg Law® Study

LEGAL MARKETING ASSOCIATION
LMA®
THE AUTHORITY FOR LEGAL MARKETING

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BODY OF KNOWLEDGE

The content in this issue of *Strategies* correlates with domains in the LMA Body of Knowledge (BoK). The BoK is a foundational resource that defines core skills necessary for legal marketers to succeed, and the individual domains focus on guiding LMA members through their journeys toward managing a high-functioning marketing organization.

Discover what you can learn from the BoK at www.**legalmarketing.org/body-of-knowledge**.

Growing With the Insights of Others

BY AMBER BOLLMAN

Before becoming a legal marketing professional, my first career was as a newspaper journalist. After college, I spent four years reporting on crime and the courts system, as well as fires, accidents, hurricanes and other breaking news, in the Florida Panhandle. I absolutely loved my job — the hidden corners of the community where it took me, the spectrum of people with whom I got to meet and interact, and the stories I had the privilege of sharing with our readers. It was an eye-opening experience that led me to law school and eventually to my first legal marketing job, where I helped craft RFP responses and other written collateral for a law firm.

Among the friends and colleagues I've made in the profession, there seems to be no "typical" path for a legal marketer. That rich variety of prior work and educational experiences, not only enhances the value we can bring to our roles and our firms, but also presents endless opportunities for professional development and growth.

One of the cardinal rules I learned from an editor early in my career is that you should almost never run a story with only one source — no matter how reliable, no matter how solid. It's only through a collection of voices that the truth begins to emerge.

In this issue of Strategies, which is focused on professional development, we tried to take that same approach, bringing you a mix stories and experiences in the hopes that you find truths to draw upon or lessons you can incorporate into your work.

In our cover story, Iris Jones speaks with five legal marketing professionals currently serving in C-level roles about how they have earned credibility within their firms and secured a voice at the leadership table. Their insights and recommendations will be valuable to anyone who hopes to climb another rung or two in their career.

In her story on engaging the millennial lawyer, Carla Landry explores the notion that legal project management can be used to improve law firm operations, streamline processes and build more collaborative, higher-functioning teams.

Rounding out the issue, we've included helpful professional development resources and a Q&A with marketing professionals who have left the legal industry. They discuss how their work in law firms set the stage for other career opportunities.

Editing this issue, I found myself impressed and inspired by the talent and creativity that exists within our legal marketing community. Learning from friends and colleagues has been critical to my professional development, and I hope the stories we've put on the page in this issue open the door for more sharing and education. Happy reading!

How Did You Get Started in Legal Marketing?

BY ASHRAF LAKHANI

Summer is in full swing. If you're not already back in bathing suit shape, it's time to give up and fully enjoy that bowl of ice cream. If you've never been in bathing suit shape, welcome to the club.

For our law firms, it's an interesting time of the year. The spring crush is behind you, the fall rush is ahead, summer associates are the center of attention and, depending on other pending projects, the summer can be a period of introspection as you take some well-deserved personal time away from the office.

When you're lounging poolside, it can be a refreshing exercise to reflect back on the beginnings of your career. One of the most common questions I suspect many of us get often is, "How did you get started in legal marketing?" Apart from people not understanding how anyone but a lawyer can work at a law firm, the story of how we got into the legal marketing industry is always an interesting conversation.

Many stories, like mine, start with an interest in law school that took a different turn. Others decided being a lawyer wasn't quite the right fit in the legal industry. There are countless others, all of which are unique and part of the fabric of our community.

As you reflect, the natural question is, "What's next?" This issue looks at several different topics around career development, including how we remain firm leaders, how we engage with a new generation of lawyers and, interestingly enough, life after legal.

I am fond of saying that unlike the lawyers for whom we work, we are not legal marketers because our parents were legal marketers or their parents before them. We chose this relatively new career, and that is what it's become: a career with a clear path of professional development and personal accomplishment.

As you enjoy this issue of *Strategies* by the pool this summer, give some thought to your professional start. Think about how your beginning shaped who you are today and how that experience will define the next chapter in your career.

Do you have an interesting story about how you got into legal marketing? Please share. Send me a short note with the details at ***alakhani@porterhedges.com****. Your story might just end up on LMA's Strategies+ blog or elsewhere in the community.*

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The Eclectic, Wandering Learner

By Betsi Roach, MIM, CAE, LMA Executive Director

We all know that growth is essential professionally and personally, but what is the most effective way to grow? If you look toward nature, you would see that roots that grow both wide and deep produce the most formidable results.

Legendary coach and leader Steve Kerr takes a page from nature's playbook with his team, the Golden State Warriors. Kerr, like many great leaders, is an avid reader — but not just of basketball or sports material. Instead, he prides himself on being an "eclectic learner," reading anything, from celebrity biographies to articles about wrongful incarceration. Leading by example, he brings this same mentality to his team, for whom he sends an equally varied reading list. This approach not only exposes them to diverse perspectives, but also emphasizes that there is more to life than basketball. He shows there is more to life outside of work by modeling work/life balance, which helps to keep his team loose and more effective.

Another key lesson from Kerr's approach is that the team learns together in an open, fun environment. If you are not having fun learning, you will not retain the information. As a leader, if you create an environment that is inclusive, diverse and supportive, you will be able to affect more change and help broaden your team's strengths. Leading by example starts with you.

The good news is that, as an LMA member, you already have a playbook to start with: the Body of Knowledge (BoK), created by LMA. The BoK showcases the breadth of legal marketing at every level — from client services to technology management — and is supported by the Competency Analysis Tools (CATs), which provide road maps for improving your legal marketing "game," if you will.

You may find inspiration in the BoK to expand your legal marketing expertise beyond your current role, perhaps into marketing technology, PR or competitive intelligence. If the latter interests you, I encourage you to broaden your legal marketing tool kit by attending LMA's Competitive Intelligence Certificate course, held November 7–8, in New York City.

Whatever you do, I encourage you to read, learn and grow in many directions. As Catherine Sanderson said in her "Science of Happiness" keynote address at the 2018 LMA Annual Conference, "Finding your passion in the classroom, in your career or in your personal life is really an essential way to maintain happiness." Happiness, like learning, is best accomplished in many directions. Let your mind and passion wander!

Learning From 2018 YHA Best in Show Winner DLA Piper

The LMA Your Honor Awards (YHA) is an international awards program that recognizes excellence in legal marketing, applauding the most impressive initiatives in the business. For the 2018 judges, one project rose above the rest, earning the coveted Best in Show title. That project was "Strategic Initiative: Predictive Analytics" from DLA Piper, part of the Business.

DLA Piper brought in Axiom Consulting Partners to assist in building a predictive-learning model that predicted with 75 to 80 percent accuracy which clients will shrink or go dormant in the next year. Using the model, the firm identified 1,200 "at-risk" clients as well as four key variables that directly affected their client relationships.

Here, Barbara Taylor, DLA Piper CMO, answers our questions about the road to a Best in Show victory.

Strategies: Why did you reach out to Axiom Consulting Partners? What were your initial project goals?

Barbara Taylor: Our initial goal was to determine if we could use our vast amount of data and a machine learning approach to grow client revenue. Based on that, we set out to determine what could be done to reverse observed decreases in revenue from certain clients. Axiom's experience at the intersection of data and entrepreneurial relationships made them an ideal fit with us in that endeavor.

In that process, you found four key variables that directly affect client relationships. Were those findings surprising to you? And if so, why do you think you had difficulty pinpointing them prior to this initiative?

The four key variables were somewhat of a surprise. Working for a global firm that prides itself on superior client service, there can sometimes be a reflexive reaction to solving problems, and that reflex is often to push harder, armed with more attorneys. But learning to "right size" the team and bring in non-attorney professionals was sort of like clearing out a hospital room to make sure everyone can hear, see and focus on what the patient needs at that moment.

How did firm leadership view this initiative when it was proposed?

Our firm leaders are approached regularly by consultants who often offer a magic wand that promises to solve problems with the click of a mouse. They were rightfully cautious, but they didn't say "no." They just weren't ready to jump in with both feet to an as-yet-unproven project and, at the outset, one that did not have a clear beginning, end or even well-defined understanding of what "success" would look like.

However, our marketing team is a group driven to complement and enhance our lawyers' ability to serve clients, and we had a gut feeling that this was a path to achieving that if we asked the right questions and had help in combing and analyzing the data.

Talk a bit about the process of securing attorney buy-in later on in the process. Was it difficult? How did you keep your attorneys looped into the process?

The attorneys who agreed to participate early in our effort were truly a coalition of the willing. Once we established that we could discern with almost 80 percent accuracy which clients would show a decline, our leadership and attorneys were encouraged and wanted to engage. Enthusiasm increased as our data analytics winnowed actions into four key variables that affected client retention. Through bimonthly meetings between a nimble marketing team that was open to new ideas and lawyers truly engaged in the project, a successful outcome was born.

Will this project be expanded upon in the future? If so, how?

Because our early-adopting attorneys saw definitive success for themselves and for their clients, we are continuing to expand and refine the project. We now have our own internal data analytics staff, and our marketing team continues to evangelize on the benefits of the program.

Looking Back on the 2018 LMA Annual Conference

Each year, the LMA Annual Conference offers legal marketing professionals a chance to get away from their desks, learn from others in this industry and connect with a wide array of like-minded people.

Stefanie Marrone worked alongside Andy Laver as a Facebook Live reporter for the conference. Here, Stefanie shares three of her key takeaways from the event:

1. Invest in your happiness. Why? Because being happy is good for you at work and at home. During the keynote discussion by the highly likeable University of Amherst "Science of Happiness" professor Catherine A. Sanderson, we learned that successful people are not necessarily happy, but happy people are more likely to be successful.

2. Always remember that everyone is your client. This concept came from several sessions at the 2018 LMA Annual Conference. It's also important to remember that the role of the client can be different things to different professionals. For example, if you are an in-house legal marketer, your clients are not only your traditional external clients, but also the lawyers at your firm, your colleagues in other administrative departments, your COO, etc. And if you are a service provider, anyone and everyone can potentially be a client or a referral source. Those who are successfully able to adopt the client-centric mind-set and delight their clients will have a significant advantage over their competitors. Period.

3. Give your clients what they want if you want them to pay attention to you. In this crowded market where law firms are vying to capture the attention of many of the same in-house clients, you must stand out. And to do that, you must provide something of value. The in-house counsel who composed the annual GC panel discussion at the conference reinforced this idea. The counsel shared that if you want to get clients' attention, send high-quality "snackable" (read: short), relevant thought leadership content. And be targeted. You must have a preexisting relationship with a GC before you put them on a mailing list.

For all 10 key takeaways, read Stefanie's full article on the LMA *Strategies+* blog at **http://bit.ly/2018LMAAC**

1. Attendees listen to a breakout session at the 2018 LMA Annual Conference in New Orleans.
2. Attendees are all smiles at the Annual Conference CMO SIG Reception, where LMA SIG members had the opportunity to meet, network and share ideas with one another.
3. LMA president Ashraf Lakhani speaks to Annual Conference attendees at the opening session.
4. Attendees pose for a photo during the Annual Conference evening reception, held at Club XLIV (named to honor the victory by the New Orleans Saints in Super Bowl XLIV) in Champions Square in New Orleans.
5. An attendee listens to one of the many Annual Conference breakout sessions.

P3 2018 – Highest Attendance Yet!

Project management, pricing and process improvement are increasingly hot topics in the legal sphere. Due to their growing popularity, LMA and the Client Value SIG introduced P3 – The Practice Innovation Conference in 2013, and the conference continues to see high interest six years later.

This year's P3 Conference, the most highly attended to date, took place in Chicago at the Radisson Blu Aqua Hotel. As in years past, the conference features an inspirational keynote, exceptional networking opportunities and plenty of chances to connect with service providers. See below for some photos from the conference, and check out recap blog posts on LMA's blog, *Strategies+*.

Marketers on the *MOVE*

Aaron Garcia was promoted to Marketing and Business Development Manager at Ackert Inc.

To submit a promotion or job change announcement to Strategies, *email* ***strategies@legalmarketing.org.*** *Want to make a move? Visit the LMA Job Bank at* ***legalmarketing.org/Job_bank*** *to view current job openings.*

1. Attendees at the P3 Conference, held in Chicago in late May, connect during downtime between sessions.

2. P3 attendees chat and network while awaiting the start of the next breakout session.

3. A P3 attendee is all smiles during a break from the programming.

Influential Outcomes

The future of business development within law firms is being influenced by legal marketing professionals. Benchmarking data from the third annual joint survey from LMA and Bloomberg Law® revealed key trends demonstrating that attorneys continue to rely on legal marketers when it comes to business development and competitive intelligence at both a strategic and tactical level.

The statistics show growing respect by attorneys for what legal marketers bring to the table and highlight how firms are leveraging the unique skills of legal marketers to build business relationships directly with clients.

2/3 OF ATTORNEYS AND LEGAL MARKETERS REPORT THAT THEIR SENIOR-MOST MARKETER PARTICIPATES IN THE FIRM'S STRATEGIC PLANNING COMMITTEE.

17% OF LEGAL MARKETERS SAY THEY ARE DRIVING THE STRATEGIC PLANNING PROCESS AT THE PRACTICE/ INDUSTRY GROUP LEVEL.

Whether they are in the driver's seat or playing the role of active participant, the impact of legal marketers is evident in many facets of overall firm strategy:

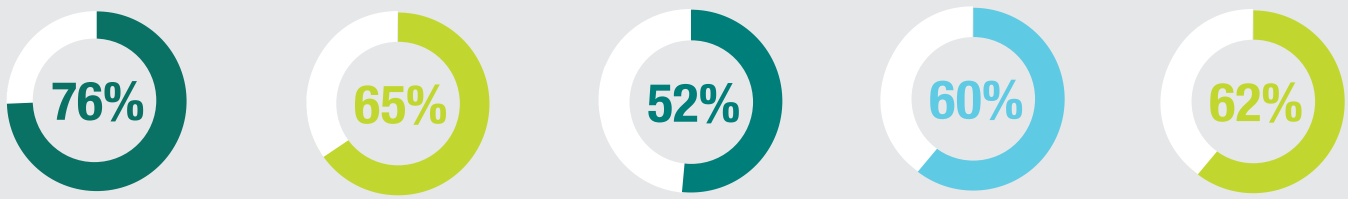
Driving the firm-wide strategic planning process
(11% legal marketer/4% attorney)

Contributing to the strategic planning process
(50% legal marketer/56% attorney)

Supporting the firm's strategic priorities once they are developed
(29% legal marketer/23% attorney)

AMONG DECISION MAKERS

More than two-thirds of respondents say that the top legal marketer in their firms is participating in strategic planning committees and lawyer professional development, as well as other firm leadership meetings. Here is a look at the top five decision-making bodies in which legal marketers are participating:



OTHER FIRM LEADERSHIP MEETINGS

LAWYER PROFESSIONAL DEVELOPMENT

DIVERSITY & INCLUSION COMMITTEE

PARTNERSHIP MEETINGS

STRATEGIC PLANNING COMMITTEE

MULTIPLE TOUCH POINTS

60% *of legal marketers say they engage in direct business development activities on some level. They are engaged in direct business development throughout the client life cycle. This includes:*

59%

INITIATING CLIENT OUTREACH

52%

CLIENT PITCH MEETINGS

44%

PARTICIPATING IN CLIENT MEETINGS WITH ATTORNEYS

36%

CONDUCTING CLIENT FEEDBACK INTERVIEWS

STRATEGIC TASKS

91% *of attorneys rely on legal marketers to perform marketing, business development and competitive intelligence tasks. Here are some of the primary tasks legal marketers are asked to perform:*

RESPONDING TO RFPS (50%)

GATHERING COMPETITIVE INTELLIGENCE (43%)

DEVELOPING BUSINESS PLANS (33%)

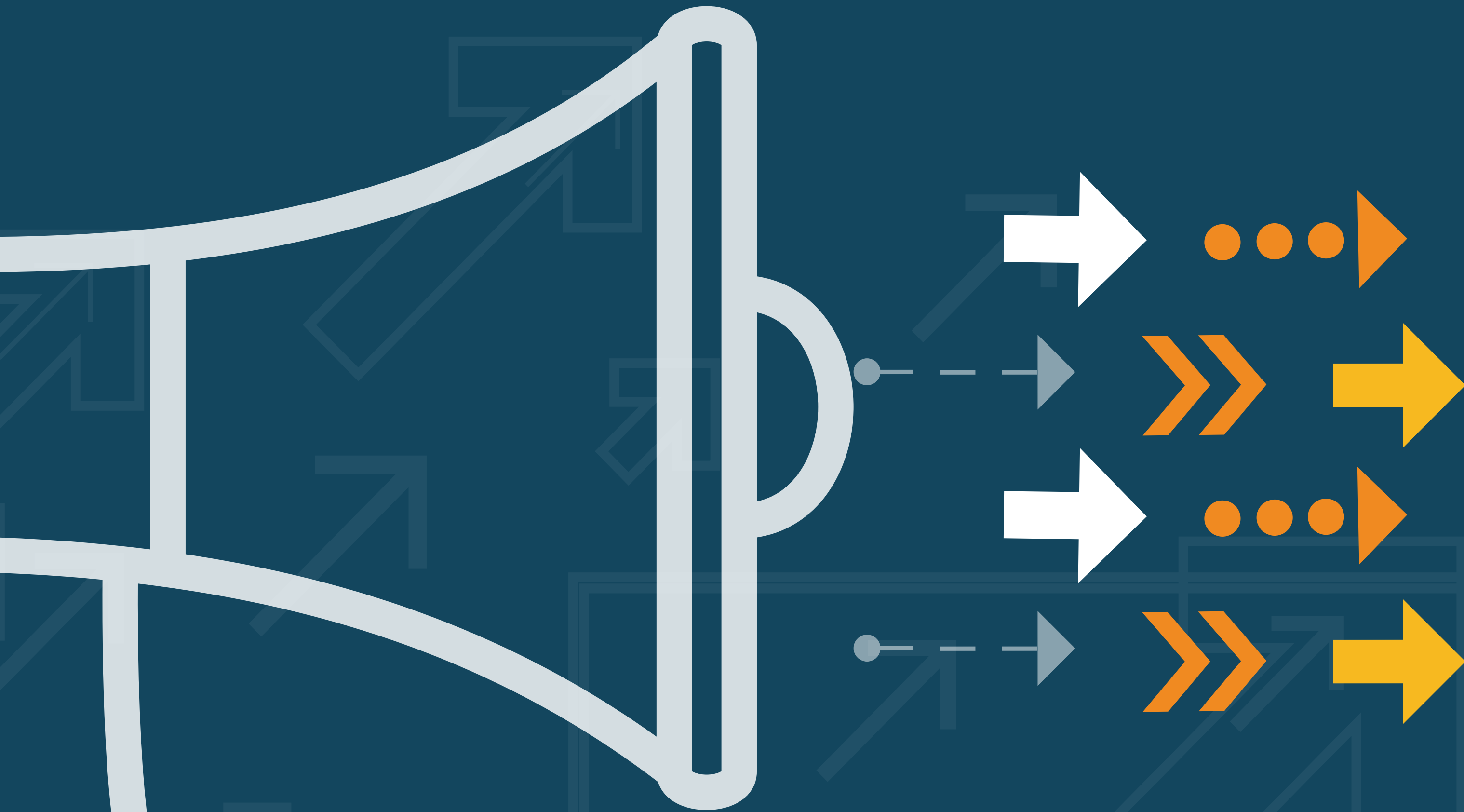
CROSS SELLING (30%)

FIVE ON FIVE:

SECURING A SEAT AND SHARING YOUR VOICE AT THE LEADERSHIP TABLE

BY IRIS JONES

Five leading legal marketing minds answer five critical questions to help you earn that coveted position of influence at the table.



We often ask ourselves what it takes to be considered a thought leader by firm management and earn a seat — and a voice — at the leadership table. In this article, we will discuss the various strategies legal marketing professionals can employ to demonstrate their value and earn that coveted position of influence.

In addition to sharing my own views, and conversations I have had over the years with my director and C-suite level colleagues, I thought it would be helpful to include sage advice from a cross-section of thought leaders serving as chief marketing and business development officers. I have invited them to share their experiences and offer advice on their personal journeys to the inner circle.

The Importance of Being at the Table and Having a Voice

The proverbial "table" is the place where leaders are seated, important information is discussed and weighty decisions are made. Why is it important to gain a seat and have a voice at this table? Learning firsthand about the next big announcement or the next innovation to be funded and launched is empowering. We feel well regarded and highly valued when our opinions and recommendations on significant matters are heard and considered. It shifts the discussion between the management committee and CMO from a monologue to a dialogue, which affords an opportunity to share new ideas, raise concerns and obtain important information about the direction of the firm.

In a thoughtful article entitled "Why Law Firm CMOs Love and Hate Their Jobs," author Michael Rynowecer states that two of the top reasons listed for hating one's job is "no voice" and "no respect for the business development and marketing department." Both reasons can be eliminated by offering that seat at the table to the CMO. Doing so can increase the likelihood of executing a successful project and improving business outcomes. Granting CMOs a seat at the table also allows them to share their voices to ask meaningful questions in order to provide excellent service to the firm, attorneys and staff.

Advice on Securing a Position of Influence

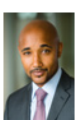
One important point to remember is that you are not required to be a 20-year veteran in business development and marketing in order to bring your voice to the table. In fact, according to the third annual joint survey from LMA and Bloomberg Law®, partners are no less likely to engage with junior marketers (less than four years' experience) than they are to engage with senior marketers.

However, there are certain attributes and values that many of our successful colleagues have in common. Being prepared to take on stretch assignments and lead important initiatives for the firm demonstrates one's value and affords the best opportunity to acquire the position of influence you want.

I recently invited several of my colleagues, considered some of the finest legal marketing minds in the country, to share answers to five questions about securing a seat at the table.

These contributors are:

Wendy Bernero, head of client development for North America at Baker McKenzie



Michael Coston, director of business development and marketing at McKool Smith

José Cunningham, chief marketing and business development officer at Nixon Peabody

Andrew Scott, director of business and practice development at Seward Kissel

Patricia "Trish" Lilley, chief marketing & business development officer at Stroock & Stroock & Lavan LLP

What steps did you take to engage your superiors? How did you earn a seat at the table?

Bernero: If you consistently deliver value and outperform expectations and you are respected and trusted by the partners and the administrative team, you will earn a seat at the table. Maintaining a deep understanding of my firm's business, clients and core practice areas helps me stay engaged with the partners in my firm.

Coston: My current role was somewhat unique in that I was hired as the firm's first director of marketing and business development. It took some time to establish the type of trust and confidence among the firm's leadership that is necessary to be effective. It was important for me to develop strong relationships with the firm's leaders and demonstrate my value to them individually and the firm as a whole. To do so, I needed to clearly understand the leadership's goals and priorities (and help to establish those goals and priorities) so that I was able to contribute quickly to the most visible and important focus areas.

Cunningham: Before you ask to even be at the table, you should demonstrate that you and your team understand the firm's strategy and are contributing to the priorities of the firm. If you can demonstrate how you add value to the firm leadership's strategic vision — with concrete deliverables and tactics — it would be shortsighted of the firm to deny you a voice at the table.

Lilley: Employ all that advice that you offer to partners about client service in your approach to firm leadership. They are your clients. Do your best to make their lives easier. Anticipate their needs and meet them early and often. Don't wait to be asked to the table. Operate as a colleague. Set regular meetings with firm leaders, both attorneys and other professionals, so that you can understand their priorities and become an advisor and resource to them. Leverage any outside speaking, writing or other professional activity to demonstrate to firm leadership that you have gravitas and respect within the industry as well. Demonstrate your expertise, strategic planning prowess and industry knowledge by arming them with relevant research, data and context to aid them in their roles. I have earned a seat at the table by ensuring that I am abreast of industry trends and fluent in the competitive landscape, but also by ensuring I know the firm, its peculiarities, its politics and how those influence our business strategy.

Scott: Communication is key. Through communication, I was able to become a trusted advisor to the lawyers with whom I work. What's important to understand — and I believe this is especially true within law firms — is that not every person communicates in the same manner. Understanding how each person thinks, acts and works is essential to relationship building. By identifying each lawyer's respective style of communication, I was able to effectively gain their trust. Once the foundation of trust was established, I was able to gain the position of influence I sought.

Why do you believe your firm listens to you and adopts your recommendations?

Bernero: I have a collaborative style, and I think I'm most successful when I can convince the lawyers to own and advocate for my recommendations. I do a lot of advance work before meetings, so when I make a recommendation, I already know where the support lies and what the objections might be.

Coston: Results matter. It's how you create credibility. When you have a track record of success, people take you seriously and begin to trust you and have confidence in your abilities. You can be an outstanding strategic thinker, but if you don't have the necessary buy-in to advance your recommendations, it hinders your ability to be effective.

Cunningham: Firm leadership sees that I have no agenda other than the best interest of Nixon Peabody, our strategic vision and tactical goals. They listen to our team's recommendations because they know I am not trying to create a marketing department empire, that I am not looking to promote myself internally or externally to the firm, that I take responsibility for the times we fall short of expectations and that I stand aside to give credit where credit is due.

Lilley: I approach strategic planning largely from a "just the facts" perspective. I base my recommendations on data, to whatever degree possible. An objective, fact-driven approach limits the role that subjectivity and emotion can play in decision-making, and I believe that translates into firm leadership respecting my recommendations and weighing my advice objectively.

Scott: Identifying problems is the easy part; providing solutions to those problems is what makes people listen. My firm (I hope) listens because whenever a problem is identified, a solution is also presented. Management trusts that problems will not only be found, but also solved.

What advice would you give your LMA colleagues who aspire to have the ear of their firm's leadership?

Bernero: Deliver clear value to all of your clients (lawyers and administrative), not just firm leadership. Practice what you preach. Always over-prepare for meetings and presentations.

Coston: I can't emphasize enough the importance of relationship building. It's the same thing we tell our attorneys about developing business. If you want to be seen as a trusted advisor, you have to be trusted. You have to demonstrate that you're competent, confident and able to add value. It's important that your personal brand speaks to each of these areas. It's also important to be proactive in identifying opportunities and/or areas that need improvement. Doing so helps firm leaders feel confident in your abilities and judgment. Finally, the leadership appreciates knowing you have your finger on the pulse of the firm. One way to achieve this is by developing relationships at all levels in the staff and attorney ranks. This way, when you provide strategic recommendations, you're able to more easily build consensus around those recommendations to understand and then effectively communicate how they will impact the firm's culture.

Lilley: Be confident, not cocky. Always know your facts. Be fluent in the data. Anticipate challenges, objections and arguments to the contrary of your position or recommendation and be prepared to engage, unemotionally, on those issues. Again, follow the advice we give lawyers: Listen more than you speak. Take a measured approach. Operate with integrity. Deliver negative or unpleasant news directly when you must. Being a "yes" person doesn't serve you well in the long run. I would also strongly recommend finding key advocates and advisors in your firm who can give you feedback on your delivery, your positioning and your perception. While having substantive knowledge is key, you do need to present yourself in a confident, professional manner. Dress the part. Fake it till you make it!

EIGHT MOVES

TO SHARE YOUR VOICE AT THE TABLE

1. Be bold.
2. Be fully engaged. More than 70 percent of today's workforce is disengaged. Don't be part of this statistic.
3. Read, learn and grow daily. Being a lifelong student aids in preparing for persuasion, influence and recommendations.
4. Be prepared.
5. Ask questions and bring ideas. Show up and speak up.
6. Report results and identify opportunities.
7. Be energetic.
8. You are a leader, so lead.

Scott: Be confident, but understand you are a part of something much larger — the firm, as a whole, is far greater than any individual. Getting management to see that you're part of the team, and working to serve the greater purpose, is key to getting folks to listen. Also, don't be afraid to make mistakes; shoot your shot. As Michael Jordan said, "I've missed more than 9,000 shots in my career. I've lost almost 300 games. Twenty-six times I've been trusted to take the game winning shot and missed. I've failed over and over and over again in my life. And that is why I succeed." You can't be afraid to miss.

What are the expectations for a CMO or director who has acquired a seat at the table?

Bernero: You must be completely discreet — if you are seen to gossip about minor issues, you will never be trusted with major ones. Know when to listen and when to speak. Always pay attention to the subtext of the discussion. Be an advocate for the firm, not any particular partner or faction. Do your homework and find ways big and small to be engaged and add value.

Coston: Leadership expects you to be a strategic thinker who clearly understands the firm's business, brand, market positioning, client base and vision. You have to be able to contribute and add significant value in each of those areas. Simply put, you earn a seat at the table when you bring something to the table. Commitment is also important. While CMOs are often seen as strategic advisors, it helps when the leadership perceives you like a partner or a shareholder who has a significant stake in the firm and is committed to its success.

Lilley: Be careful what you wish for. If you are part of the firm's strategic team, you need to be fully invested in that role. You need to care about, know about, research and understand all aspects of the institution, from its IT landscape and data security profile to its client base and revenue streams. The expectations are that you are a leader and a contributor, so there is no resting on your laurels.

Scott: Expectations are always high, but that's true across every level. This question goes hand-in-hand with question two — management expects that you bring to them solutions, not problems. They don't want to hear about what went wrong; they want to know what steps were taken to make things right. Simply put, they expect you to do your job; fill your role and find a way to get it done.

How important is it to have a seat at the table?

Bernero: It depends on the firm. If your firm has a top-down management style, having a seat at the table will help you get things done. If your firm is a collegial democracy with high levels of partner autonomy, the leadership may have limited power. In those firms, you can achieve a lot without a seat at the table.

Lilley: The mission of the department should be to ensure the health of the firm's business and client development — both in maintenance and growth mode — so a seat at the table allows you to directly influence that. It makes your days a lot easier.

Scott: It's very important to be at the table, because that's where the decisions are made. In law firms, there can be a lot of politics, but ultimately, it is at the table where the final decisions are made. Being there — being a part of the team — enables one to put forth their perspective on the situation, a perspective that may differ from the lawyers who are focused on providing superior legal service.

Conclusion

Circling back to the article from Rynowecer, he states, "CMOs love their job when they are making a strategic impact… have freedom to make decisions, have a voice and feel valued."

It's first about getting a seat at the table, but then sharing your ideas, your perspectives — your voice — once you are actually in the room to show the value a business development and marketing perspective brings. Without the CMO/CBDMO leadership at the table, an opportunity for an innovative, diverse perspective and a focused approach to future growth is lost. Furthermore, there is risk of higher turnover and burnout when an earned seat is not made available.

Bring strategic ideas, build relationships and understand the big picture at your firm, and the seat will be easier to attain and retain. If you are still not invited to sit at the table, when all else fails, do not wait to be invited. Simply ask for a seat and be ready to share your voice.

Remember, be prepared to answer the question: "Why should you be given a seat at the table?" ■

***Iris Jones** is the chief business development and marketing officer for McNees Wallace & Nurick LLC. Iris leads the firm's business development and marketing team in delivering proactive strategy, service and high-level support to the firm and its attorneys. Iris serves on the firm's Diversity Committee, Professional and Personal Development Committee (PPDC) and the 2026 Futures Committee; she is also co-chair of the LMA Diversity & Inclusion SIG.*

The content in this feature correlates directly with the Marketing Management and Leadership and Communiactions domains in the LMA Body of Knowledge (BoK). To dive deeper into these subject areas, head to the Marketing Management and Leadership BoK domain here: **http://bit.ly/LMABoKMMaL**, and the Communications domain here: **http://bit.ly/LMABoKC.**

LEGAL PROJECT MANAGEMENT AND THE MILLENNIAL LAWYER ▷▷▷

BY CARLA LANDRY

Millennials, roughly defined as the generation born between the early 1980s and the early 2000s, have prompted conversation across industries about how to most effectively engage and manage them, given that they walk, talk and think differently than their older colleagues. Although the generational difference has provoked such headlines as "Millennials and Entitlement in the Workplace: The Good, The Bad, and the Ugly" (Forbes, November 22, 2017) and "Want to Get Work Done? Don't Hire a Millennial, Business Owner Says" (NY Daily News, April 11, 2016), the millennial worker does not need to be a site of anxiety.

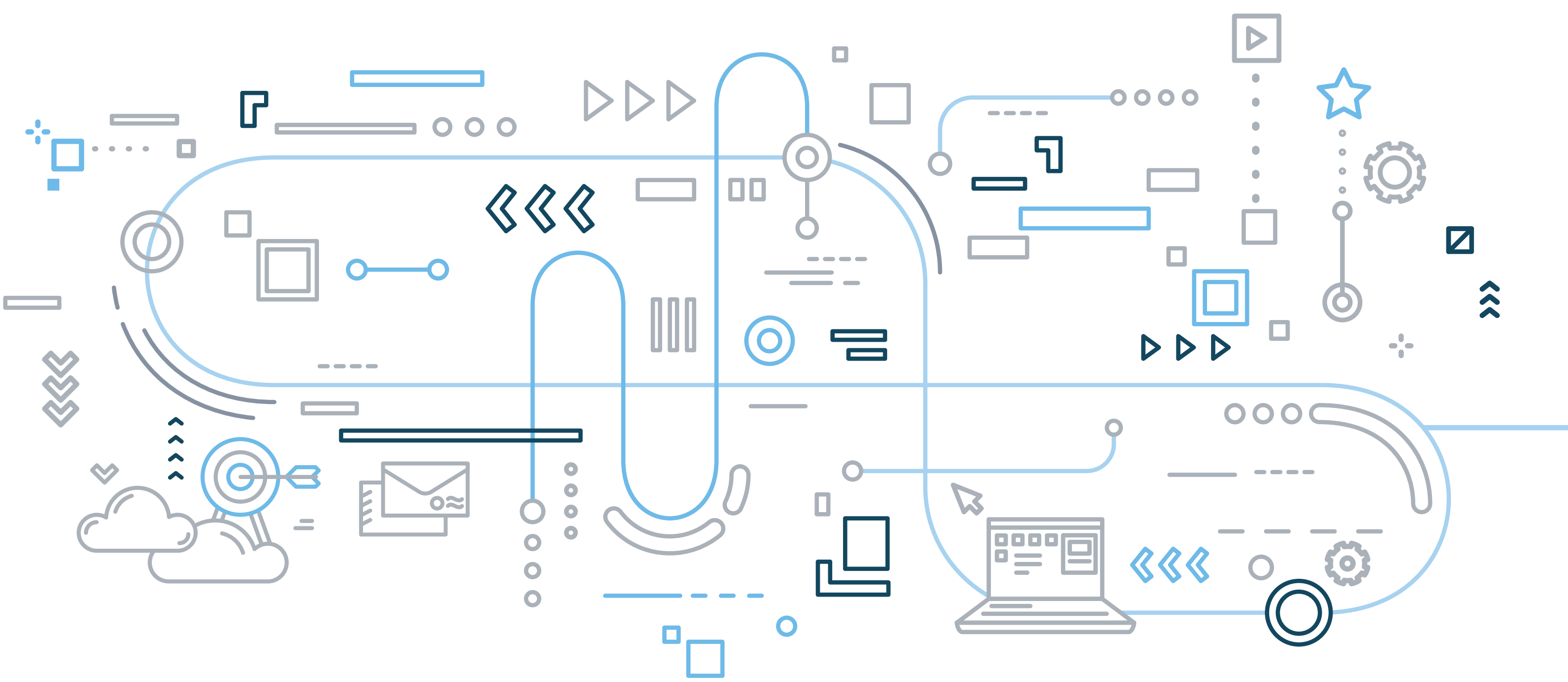
Millennial lawyers do not view achieving partnership at a firm as the only marker of success in the legal arena, and statistics show that millennial lawyers leave one law firm for another at rates not seen before now. Simply put, if a millennial lawyer no longer feels valued or excited about the firm with which they are working or the work they are doing, they feel free to move on. It should be emphasized that far from being a negative, the unique traits of the millennial lawyer hold great potential for innovation and increased profitability for law firms. Millennial lawyers are distinctive for their ability to work cooperatively, multitask, utilize technology, and most of all, communicate. So how do you engage those characteristics and help the lawyer feel valued and excited? One answer may lie in legal project management (LPM).

Legal project management (LPM) is a methodology used to improve the efficiency and profitability of legal projects through more proactive management of matters. LPM is not only well suited to the temperament of the millennial lawyer, it is an approach that illustrates that their work is meaningful.

We spoke with three firms that have implemented LPM, all of which noted they have seen direct benefits when engaging the millennial lawyer in the process. In each of these firms, LPM is driven by the attorneys and supported by LPM resources, from a few LPM experts to entire LPM functions. In some instances, there were specific LPM tools that facilitated millennial lawyer engagement, and in others, it was the fundamental element of enhanced communication that prompted greater commitment. It's no secret that junior attorneys typically do not have access to the financials of their firms. These numbers are often only shared with partners. As a result, it can be difficult to understand the business of law and how LPM can drive profits and value. Esther Bowers, director of client service initiatives at Barnes & Thornburg, noted that a younger attorney "needs to be motivated by something other than money." Bowers has seen how "LPM provides greater insights into the client business strategy and that this can be exciting for the millennial attorney as they're able to see and understand the bigger picture."

At its core, legal project management is about planning. It's an approach in which all parties involved understand their roles and the timeline and are in clear communication with one another. "Understanding everyone's role helps the millennial lawyer know where to go," Esther said. "Further, the lawyer appreciates the opportunity to exercise their intellect in a more strategic way and is able to do so more easily when understanding how their responsibilities fit into the matter overall."

Studies conducted by the Intelligence Group on millennial workers revealed that a full 88 percent of them prefer a collaborative work environment over a competitive one. Collaboration is a fundamental element of legal project management, as efficiencies are higher when all members of a project team are able to support each other in their various roles. This desire to collaborate reveals another divergence from baby



boomer lawyers, many of whom have spent the majority of their careers operating with an independent mentality. In other words, boomers are known for tackling tasks independently as opposed to in a team setting. Legal project management is best executed when teams tend toward collaboration over independence. Esther has observed that "open communication from partners drives better teamwork." Millennial lawyers as a whole are predisposed to cooperative work.

Lynne Maher, senior manager, legal project management at Hunton Andrews Kurth, has had similar experiences witnessing the millennial lawyer become more fully engaged through LPM. Utilizing LPM tools and techniques helps the junior attorney have the "ah-ha" moment. "Millennials are achievement oriented and want meaningful work," Lynne said. "Showing them the impact of what they're doing — the piece for which they're responsible — on the overall relationship gives meaning to their work. They're able to see how they fit into the bigger picture and are more engaged in the overall process as a result. Simply sharing budgets has been key to helping the millennial lawyer understand the importance of accurately using task codes, communicating progress and how all of that brings greater value to the client."

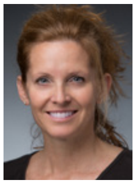
Christine Siler, head of legal project management, continental Europe at Hogan Lovells, has also seen the benefits of sharing the bigger picture with the millennial lawyer. "It seems really basic, but some of the best feedback I've had from our junior lawyers is that they only get to see one aspect of a large transaction — the bit they're involved in — and not a complete picture of what is often a complex transaction," Christine said. "Basic scoping tools, checklists, full matter plans and risk analysis matrices can be great learning tools to cover lots of moving parts that can sometimes be overlooked in fast-paced transactions. Sometimes, the most basic tools like project plans (in a Gantt chart format, for example) provide an overall view of deals or cases that go on for much longer than the lawyer's involvement. That clarity is great for improving confidence to ask questions, spot issues sooner and give a sense of responsibility and ownership that, I think, millennials thrive on."

Far from being a problem, the millennial lawyer may be exactly what the legal world needs right now. They offer the legal field a chance to contemplate long-standing practices, such as the traditional partner model of success, as well as the temperament and skills to effectively institute legal project management. The millennial lawyer wants to accomplish the same things as previous generations of lawyers — the delivery of high-quality work product — they just want to do it a different way. This millennial tendency toward different approaches may very well allow for natural efficiencies to become fully integrated into law firms.

If we operate under the assumption that the millennial lawyer is part of the next generation of firm leadership, then "exposure to LPM builds good habits for how they will lead and manage teams and build relationships with clients," according to Lynne.

The long-term view of the benefits of LPM is also critical for Hogan Lovells. "We are very serious about developing the talent of the next generation of lawyers at Hogan Lovells," Christine said. "We have a number of programs not only looking at training in the more conventional sense, but also looking at the whole experience that customers demand from their advisers. Communication and managing expectations is a key plank in LPM and a central focus of our training. It's critical that we engage the next generation of lawyers to work with our clients not just on legal strategy, but to build long-lasting relationships. Those types of relationships are built on trust. Focusing on communication skills in the age of technology — to manage the expectations of our clients in a way they genuinely understand and engage — is a great way of doing that."

While the legal field is exceptional for the diverse generational range of its lawyers, this anomaly offers great potential for the integration of methods meant to improve the overall legal processes of a firm. Savvy business development professionals inside law firms will seize on the strengths of the millennial generation to drive positive change. ■



Carla Landry *is a senior consultant with LawVision. She has worked in the legal industry, both in-house and as a consultant, for more than 20 years. Carla advises law firms on a variety of financial, strategic and operational issues. Together with a colleague and a team of certified Project Management Professionals (PMPs), Carla created the first project management certification program designed for the legal profession and launched the first online e-learning courses in legal project management. She coaches legal teams on implementing legal project management techniques into their matters.*

The content in this feature correlates directly with the Client Services domain in the LMA Body of Knowledge (BoK). To dive deeper into this subject area, head to the Client Services BoK domain here: **http://bit.ly/LMABoKCS** .

LIFE AFTER LEGAL

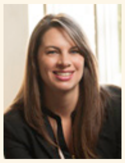
BY AMBER BOLLMAN

We asked four former legal marketing professionals who ultimately moved into other industries — including one who left and then returned to law — for their perspective on professional development. They offer candid assessments on how law firm experience translates outside the legal industry and how marketers can make themselves more marketable in the broader economy.

Interviewees:

James Wood enjoyed eight years on Bryan Cave's business development team. For the past three years, he's been leading the executive health program for MDVIP, a national network of primary care doctors focused on personalized medicine.

Megan Dugan Gilbert spent time at Covington & Burling and Drinker Biddle & Reath, later moving on to Bloomberg BNA. She now leads corporate learning and development for BLR Holdings, Inc., which offers staffing and operations solutions for in-house creative teams.



Taryn Elliott has served in marketing and business development roles for professional services firms since 2003. After a decade of working in law firms, she moved on to become the marketing director at Lushin, Inc., which provides sales, management, and professional development consulting to businesses.

Roy Sexton has significant experience in both the legal and healthcare industries. He recently returned to a law firm environment, assuming the role of director of marketing at Kerr Russell after a stint as regional marketing director of a large health system.

When you moved out of legal and into another industry, what were the biggest adjustments, particularly in terms of your professional development and which "muscles" you were using?

Wood: I was fortunate to find a position that translated well in that I'm still focused on business development within professional services. That given, I'm directly responsible for growing a specific line of my company's business, so I implement my strategies and interface with clients and prospective clients. What stands out the most to me is the need to continually and quickly adjust to what's working and what isn't.

Gilbert: The biggest adjustments were changing approach and adjusting expectations. Lawyers and legal professionals speak a unique language, and they conduct themselves and their business in a way that can be very different from other industries.

Elliott: Sometimes we have a tendency to get set in what works for the uniqueness of law firms and law firm marketing — or, at least, what is perceived to be unique. When I transitioned out of legal, I had to step back and look at a much broader marketing picture than I was accustomed to. It was a little bit like going back to marketing 101. I found it refreshing to take on new challenges and to try new things that were maybe outside of the norm for legal marketing or that my firms were not quite ready for. Plus, without some of the constraints of advertising rules, I had some more freedom in my approach to marketing projects, ways I could focus on client acquisition and how I could leverage technology.

Sexton: I had spent a decade in healthcare prior to legal, so I had familiarity with the bureaucratic nature of that industry. Healthcare is full of wonderful people who want to do good for the world, but the compartmentalization and hierarchy of tasks and decision-making in, say, an operating room don't always translate well to the C-suite. I must admit I had grown accustomed to and appreciated the "immediacy" of working in a law firm. We may joke that decisions are made at a snail's pace sometimes in legal, but you generally have access to the people involved, and a lot of work is still done through face-to-face conversation. I had to readjust my thinking — once I was back in healthcare — to having layers and layers of people involved in my work and still not always anticipating who had a stake in what I was doing. I think it is key when entering a new industry to take some time to assess the decision-making culture and understand clearly what autonomy you do and don't have. That was my biggest struggle and what ultimately made me realize a life back in healthcare was not for me.

The reality for me is that I wanted to remain in legal, but lead legal marketing positions are not always easy to come by if you aren't in a position to relocate. My prior firm was a wonderful experience, but their niche of law was contracting, and the diversification strategy never stuck there, so I knew I needed to make a leap. Hence, the healthcare job, leading a marketing strategy for a local health system's new employed physician network. A year into my second foray in healthcare, I'm grateful to say I was able to make the leap back into legal. I love my new firm so much, and I think the challenges I witnessed in healthcare made me appreciate more fully the respect and authority I do have as a solo marketer versus being part of a large, established, preexisting marketing team.

"Embrace innovation — it's okay to try something new and have it not work out."

What could the legal industry stand to learn from your new industry?

Wood: I don't claim to be smart enough to dictate what one industry could learn from another. I will speak for myself and note that if I was to return to legal marketing, I would do so only if I could be more directly involved in a firm's business development efforts. One of the reasons I miss daily interactions with many of my former legal marketing colleagues is you all are such a smart, thoughtful group of people. I encourage you to be assertive in discussing ideas, pushing for action and providing insights. There is only upside because even a failure is a lesson learned.

Gilbert: Embrace innovation — it's okay to try something new and have it not work out. Be nimble, figure out the takeaways from that and iterate to a new approach. Also a focus on customer service and experience — shifting to see legal services as a product and your firm as a brand — defining what your firm's "story" is and being able to clearly articulate your firm's value proposition.

Elliott: Maybe it is because I work in sales consulting now, but fully embracing the role of sales and not being afraid of calling it what it is would be a benefit for the legal industry. There is a lot of nuance and opportunity in sales. I have seen law firms struggle to get past the notion that sales is all slimy tactics and manipulation, but, when done right, it is actually the opposite. Salespeople, whether they are lawyers, consultants or engineers, will have more success when they establish a repeatable process and the necessary skills to build trusted-advisor status by effectively communicating with prospects and clients, understanding their problems and the impacts, and how to offer a solution that alleviates those issues.

Sexton: I think legal has a tendency — as do all industries — to assume that every other organization functions as they do internally. That is not to say there aren't interesting parallels between doctors and lawyers. These include a "guild" mentality and a sense of "paying your dues" to move up the ranks, a surety of purpose and a certainty of knowledge (even for topics around which they may have no prior experience!) and a sense of the risks they take every day with their own careers as solo practitioners embedded within larger organizations.

However, you also have to appreciate the differences. Outside looking in, there are many more decision-makers in healthcare, so it may not always be clear to whom you should pitch new legal business. The politics in healthcare can be quite intense between physicians and hospital administration, sometimes to the detriment of the core mission. Don't let your own internal politics derail your mission, and know that when you are pitching to a complex organization — whether on behalf of a firm or a service provider — understand that their process may be slower, more complex and foreign to you. Being patient and gracious will go a long way with the person on the other side who may be championing for you and/or your firm.

If a friend/colleague currently in legal came to you and asked for advice on how they could build a set of skills that are transferable to non-legal fields, what would you say? What should they do to make themselves more marketable outside law firms?

Wood: If you don't already know, explore what you love about what you do now. Some significant aspect of your current job needs to be translatable to your next job, whether in legal marketing or outside the industry. In general, what you love is also going to align to what you're good at, and this is key. Be relentless in honing that skill. Network intelligently — do what you want all your lawyers to do. And put yourself in situations where you meet firm clients and prospective clients. This will help you be more effective in your current role and better positioned for a potential future move.

Gilbert: Collect work samples; if that's a presentation deck, marketing collateral, writing samples, etc. Keep track of numbers. Did you help win "x" amount of new business for the firm (or a particular practice group)? I think something that is huge for non-legal professionals in this industry (marketing, BD, client development, etc.) is that you are constantly having to prove your ROI to the firm. Channel that and determine what your direct contributions are toward larger firm objectives.

Elliott: When I was interviewing outside of the legal industry, some potential employers were concerned that I had been in legal too long and so would not be creative enough. In legal marketing, we often talk about law firms being behind in adopting trends that other industries are already utilizing. Some firms are on the cutting edge of what is happening in marketing, and that's great. But if you are at a firm that is not, I would take the time to learn about what other trends are happening in marketing outside of legal and how you may be able to apply those activities utilizing the skills you have built in legal.

Sexton: I think it definitely helps that I have significant experience in two different industries. I can toggle back and forth between them as needed (unless my prior comments offend!). I would suggest that, as you work in your firms, pay attention to the industries you support and keep a log of significant experiences you may have interacting with any or all. Being able to demonstrate an inside knowledge and appreciation for said industries can certainly help in a job search and/or industry switch. Also, be confident that your skills are portable and applicable to any number of organizations. Obviously, other professional services organizations are the easiest fit: accounting, consulting, etc. But look at something like my experience of working with a network of doctors. Yes, you may need to learn a new set of acronyms, but what are the parallels? The parallels may be: solo practitioners, part of a network, need to grow their business, reach an audience, lead with their skills and thought leadership. Not that different from marketing an attorney. Plus, remember that you are a consumer. Why do you buy the products you do? In this case, why would you choose a certain physician? And apply the skills you've learned in legal to that process. ■

The content in this feature correlates directly with the Marketing Management and Leadership and Business of Law domains in the LMA Body of Knowledge (BoK). To dive deeper into these subject areas, head to the Marketing Management and Leadership BoK domain here: **http://bit.ly/LMABoKMMaL**, and the Business of Law BoK domain here: **http://bit.ly/LMABoKBoL**.

How Does Your Career Grow?

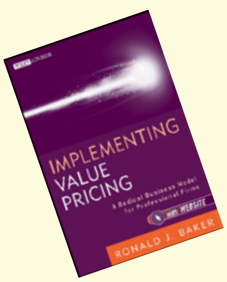
As you gear up for summer, and hopefully some travel or time away from the office, check out a few professional development-focused reading and listening recommendations from the *Strategies* editorial committee.

1. Getting Naked: A Business Fable About Shedding the Three Fears That Sabotage Client Loyalty

This book by Patrick Lencioni explores why vulnerability is so important in business, serves as a resource for developing competitive advantage in difficult times and offers insights for inspiring customer and client loyalty.

2. Harvard Business Review

This tried-and-true resource won't steer you wrong. The *Harvard Business Review* is a general magazine published by Harvard Business Publishing, a wholly owned subsidiary of Harvard University. Gain insights on management, strategy, innovation, productivity — you name it.

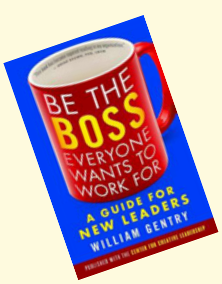


3. Implementing Value Pricing: A Radical Business Model for Professional Firms

Challenge yourself to think differently. *Implementing Value Pricing*, by Ronald Baker, identifies the customer as the "sole and ultimate arbiter of value." Rather than selling capital with pricing based on cost or time to formulate, Baker recommends selling based on results.

4. David Ackert's Market Leaders Podcast

Want to learn on the go? David Ackert, an award-winning adviser, coach and thought leader in the legal marketing and business development sphere, shares business development solutions and expert training to service professionals and their firms. Download the episodes and listen as you travel!



5. Be the Boss Everyone Wants to Work For: A Guide for New Leaders

At the outset of your career, it's all about standing out from crowd. In short, it's all about "me." This book by William Gentry asks leaders to flip the script from "me" to "we," and offers practical advice on becoming the team-focused leader everyone wants to work for.