



THE NEW ELLIS GROUP

# Monday Monday

*Connecting the Dots with Karen Kaplowitz*



*Helping you create and reinforce the habits of successful career building,  
gleaned from my work as a business development strategist, trainer and coach*

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## Maximizing the ROI of Post-Covid, In-Person Events

Law firms are ramping up plans for all kinds of post-Covid in-person events: client conferences; partner retreats; and CLE programs with meals or receptions. Being forced to make do for two years with virtual events led to two things: an appreciation of the value of in-person events but also an appreciation of their significant cost in time and travel expense. As you get back in the groove of in-person events, here are some planning tips to insure you get maximum return on investment (ROI) from the investments, before, during, and after the events:

- Be selective. Everyone is hungry for more personal interaction, but the costs to lawyers and to the firm for in-person events are also more obvious, including continued exposure to Covid.
- Be strategic. Go to events which your clients and their colleagues are likely to attend. Pick events where you can have a prominent role as a leader, organizer, or speaker. Invite a client to speak if possible.
- Whether the event is hosted by your firm or a third party, always ask for a list of attendees so you can do advance planning. It has been proven that going to events for the opportunity only to do random networking minimizes the results.
- If your firm is hosting a client event, do not depend on your clients and prospects' receiving an invitation from firm mailing lists. Extend personal invitations to clients and prospects; they will be your top priority at the event.
- At firm events for clients or partners, identify any client relationship partners with whom you have worked successfully who will be there. Look for opportunities to spend time with them. If your mutual clients will be there, too, offer to help entertain them.
- Do your homework on clients you expect to see. Research the work your firm has done for them and work that has been handled by other firms, so you know the competitive landscape.
- At the event, keep track of who you meet and promises you make like sending material or making introductions so you can follow up promptly.
- Before following up, ask for guidance from the client relationship partner. Your goal is to broaden client relationships, not compete for the attention of clients.

It is exciting to be able to meet people in person again and important to take the time to plan to get the most value from the time and expense involved in events, before, during, and afterwards.

**Example:** When her firm organized its first major client conference post Covid, a practice group leader consulted with the partners in the group who had been most successful in bringing back business from the firm's conferences. She asked them to advise her on their best practices. They uniformly emphasized planning and follow through. She then scheduled a meeting of the group. She asked each lawyer to personally encourage clients to attend. She also arranged for several lawyers in her group to speak at the conference. She circulated the attendance list to lawyers in the group and asked them to identify clients they knew who would be there so they could make plans to see them and introduce them to other relevant lawyers in the firm. She asked the practice group's business development staff coordinator to keep track of each lawyer's plans. For lawyers who did not report plans, the staff followed up to make sure that every lawyer who was attending had a game plan for the conference. The staff also contacted each lawyer after the conference to insure that they followed up with clients. The result was that the first client conference post Covid yielded more new business than at any prior client event the firm had hosted.

As you resume in-person client and partner events, are you taking the time to plan them and execute them so everyone gets the benefit of the best practices of your most successful rainmakers?