



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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The Importance of the Personal Touch. You finally got organized and have included your clients and contacts on all the firm mailing lists. You also respond in a timely way whenever you are requested to suggest clients or significant friends of the firm to invite to special firm events, like special access to a museum exhibition, or a reception, or a spa day. So your people now regularly receive firm announcements, alerts from your practice group and other relevant practice groups, and they are invited to special occasions which are designed to bring clients closer to the firm.

Is that enough? While it is important to take advantage of firm wide marketing initiatives to stay in touch with your clients and prospects, communications “from the firm” do not substitute for ongoing personal interaction between you and your key contacts. How often do you get a law firm announcement and not remember exactly who you know at the firm? That is what some of your contacts experience when they get a generic firm announcement, invitation, or client alert. Even when firm events are very attractive, if there is no personal invitation, it is less likely that your clients will show up and the invitation will be less valuable for building your relationship. How do you personalize firm wide marketing initiatives when you do not control them? Here are some guidelines.

- Notify your clients in advance that an invitation from your firm is on its way. That way, clients will identify you as the sender even if you are not otherwise identified.
- Ask the marketing department to allow you to add notes to your clients to invitations to firm events so they are more personal. Then supply your marketing department with the personal notes on a timely basis so the invitations to your clients are not delayed.
- If you are really interested in your clients’ attending a firm event, follow up with them directly and make it worth their while to attend.
- With respect to client alerts which are sent by the firm, if you are not at least named in the alert as one of the lawyers to call with questions, send an extra copy to clients who may be affected by the developments with a note acknowledging you know they already received the alert from the firm but wanted to call it to their attention because of your knowledge of their specific needs.

Example: A large firm hosted a private reception for select clients at a museum to preview an important exhibit which was hard to get into. When partners got notice of the reception, Suzanne, a partner in the mergers and acquisition practice group, first insured that her important clients were on the list. Suzanne then alerted those clients that they would be getting an invitation and that she would be attending herself. She also arranged to have her personal notes included with the invitations. Then Suzanne went one step further. She contacted several important clients and offered to use the occasion to introduce them to other clients of the firm she knew they would be interested in meeting. To make the coordination easier, she focused primarily on clients she knew personally. She also reached out to another lawyer in the firm for access to a client she did not know, and arranged to team up with him to facilitate those introductions. The event was a memorable and valuable occasion for Suzanne and her clients.

To get full value from premium marketing events hosted by your firm, are you prepared to take some initiative to use those events to advance your own marketing agenda with valuable clients in a more personal way?