# Contents

**Executive summary** ..... xi

**About the editor** ..... xix

**About the contributors** ..... xxi

**Introduction** ..... xxix
*By Deborah B. Farone*

**Part 1: Core Marketing and Business Development**

**Chapter 1: Building a firmwide marketing strategy – a roadmap for law firms ready to grow** ..... 1
*By Deborah B. Farone*
Why you need a firmwide marketing strategy ..... 2
What can go wrong without one ..... 3
How to start – match it to the firm's direction ..... 4
How to get buy-in ..... 6
Keeping everyone on target and aligned ..... 7
The bottom line ..... 10

**Chapter 2: Brand positioning and differentiation – a practical framework** ..... 15
*By Brandie Knox, principal and lead strategist, Knox Design Strategy*
The process – a practical framework ..... 16
1. Planning – setting the foundation ..... 17
2. Discovery ..... 18
3. Synthesis – making sense of what you heard ..... 24
4. Strategy ..... 25
Conclusion ..... 27

**Part 2: Getting into the Tactics**

**Chapter 3: Client relationships as strategic capital – how to build an enduring key client account program** ..... 29
*By JeanMarie Campbell, chief marketing and business development officer, Jenner & Block*
The new reality of client relationships in law firms ..... 29
A practical framework to bring consistency to key client management – the RELATE model ..... 31
How strong are your client relationships? ..... 34
Case studies ..... 37
Implementation is about making things stick ..... 37

**Chapter 4: Cross-selling to cross-investing – breaking silos to build enterprise value and win** ..... 39
*By Julie Henson, chief growth officer, Decipher Investigative Intelligence*
Why cross-selling fails in most law firms (and why that's the wrong diagnosis) ..... 39
From transactions to trust – the cultural foundation of cross-investing ..... 41
The economics of individualism – how compensation and metrics undermine collaboration ..... 44
Cross-investing defined – a growth strategy, not a courtesy ..... 47
Lateral integration as the ultimate stress test for collaboration ..... 48
Leadership's role – what managing partners must model (and enforce) ..... 49
Building the infrastructure for collaboration ..... 50
The firms that cross-invest will win ..... 52

**Chapter 5: Smarter collaboration analytics – turning data into performance** ..... 55
*By Heidi K. Gardner, distinguished Fellow, Harvard Law School, and Ivan Matviak, CEO, Smarter Collaboration*
Why collaboration analytics is the new frontier for law firm growth ..... 55
Moving from data → insights → action → growth ..... 56
Firm-level insights – understanding the collaboration signature ..... 57
Sector-level insights – where the market demands collaboration ..... 61
Practice-level insights – the hidden pipelines between practices ..... 62

Client-level insights – turning under-penetration into growth ..... 65
Partner-level collaboration – the business case, the benchmarks, and the early warning system ..... 68
Turning collaboration analytics into behavioral change and performance ..... 75
Conclusion – collaboration analytics as a competitive advantage .... 79

**Chapter 6: Content differentiation in the age of information abundance** ..... 83
*By Andrew Longstreth, head writer, and Jamie Diaferia, founder and CEO, Infinite*
Distinctiveness over volume ..... 83
Leadership sets the signal ..... 84
Strategy sharpens the focus ..... 86
Infrastructure for sustainability ..... 87
Recognizing and rewarding what counts ..... 89
Making it easy to leverage content ..... 89
Great expectations ..... 91

**Chapter 7: Embedding a BD mindset – making it part of your professional identity** ..... 93
*By Trish Lilley, chief marketing and business development officer, Barnes & Thornburg*
Speak a new language ..... 94
Know what we're up against ..... 95
Recasting business development as a core professional responsibility ..... 97
Making the shoe fit – authenticity as strategy ..... 98
Sustainability – embedding BD in behavior ..... 100
The nutshell ..... 103

**Part 3: Developing Human Resources**

**Chapter 8: From knowing and doing to being – how lawyers become effective, whole person practitioners** ..... 105
*By Diane Rosen, EdD, JD, MBA and Natalie Loeb, MS*
Old school law school ..... 105
Professionalism, professional identity, professional formation ..... 106
What competencies and characteristics do lawyers need? ..... 107
Learning to be a lawyer ..... 108

How individuals can maximize and self-direct their learning ..... 111
Becoming a lawyer is not a solo endeavor ..... 112
The whole-person lawyer – integrating identity, skills, and relationships ..... 115
Putting it together ..... 116

**Chapter 9: How internal communications impact morale and firm cohesion** ..... 119
*By Allan Schoenberg, chief communications officer, and Renate Wagner, director of internal communications, Vinson & Elkins*
Culture as the operating system ..... 119
The culture–communication–leadership loop ..... 120
Translating strategy into shared language ..... 121
Transparency – honesty, consistency, and judgment ..... 123
Listening as a leadership discipline ..... 124
Communications architecture – channels, cadence, and governance ..... 125
Knowledge-sharing as a growth engine in an era of uncertainty ..... 127
Recognition and learning – making culture visible ..... 128
The manager cascade – where strategy becomes real ..... 129
Measurement and accountability ..... 130
Culture as competitive advantage in law firms ..... 132

**Chapter 10: Wellbeing as business infrastructure – why BD cultures fail without psychological safety** ..... 137
*By Renee Branson, MA, RB Consulting*
The hidden infrastructure of business development ..... 137
The neuroscience of professional risk ..... 139
Why lawyers hesitate to cross-sell ..... 140
Case example – a firm that changed the dynamic ..... 144
Psychological safety as strategic infrastructure ..... 145
Psychological safety readiness for BD initiatives ..... 145
Red flags leaders should watch for ..... 146
Leader behaviors that lower threat ..... 148
The economics of psychological safety ..... 149
From initiative to culture ..... 150
A framework for BD culture – the collaboration infrastructure model ..... 150
The infrastructure leaders cannot ignore ..... 151

**Part 4: Operations and Change Management**

**Chapter 11: Leveraging AI as a strategic partner in business development** ..... 153
*By Jennifer Leonard, founder, Creative Lawyers*
The AI moment in legal business development ..... 154
The VOICE framework – five dimensions of AI-enhanced business development ..... 155
Applications across firm types ..... 159
Building a culture of creative experimentation ..... 161
Identifying your highest-value opportunities ..... 162
Seizing the moment ..... 163

**Chapter 12: Budgeting and ROI measurement – ensuring marketing investments deliver measurable value** ..... 165
*By Monica Rodriguez Kuniyoshi, principal, MRK Strategies*
Reducing risk by taking a measurement-first approach ..... 166
Understanding the starting point – the measurement ladder ..... 167
Art of the possible – aligning ROI measures to the firm's current level ..... 171
The risks of over-relying on data ..... 173
Expanding your field of view – budgeting for technology, internal resources, and external support ..... 174
Budgeting through the ladder – pilot, improve, scale, and refine ..... 179
Making progress – strategy meets stage ..... 180

**Chapter 13: Lateral integration and onboarding – using marketing strategy to accelerate success for new partners** ..... 183
*By Jessica Grayson, chief growth officer, Stradley Ronon*
Reframing lateral hiring as a growth strategy ..... 183
A different model ..... 183
Before the search – aligning laterals with growth strategy ..... 184
Market intelligence as a screening tool ..... 185
Recruitment phase – using brand and experience to compete ..... 185
Designing the candidate experience ..... 186
Vetting beyond the portable book ..... 187
Between signing and day one – building the launch plan ..... 188
Market messaging and announcements ..... 189
Aligning expectations before day one ..... 190
Onboarding and integration – the first 90 days ..... 190

The first 90 days framework ..... 191
The lateral launch toolkit ..... 192
Avoiding common integration failures ..... 193
Beyond 90 days – sustaining success ..... 194
Measuring what matters ..... 194
Continuous improvement ..... 195
Implementation framework – getting started ..... 195
A self-assessment for your firm ..... 197
Designing for success ..... 197

**Part 5: Client-Centric Focus**

**Chapter 14: What the firm already knows – how integrated client intelligence drives business development** ..... 199
*By Nat Slavin, managing partner, Client Insight Ventures and CEO, ClientSignal*
The real reason that business development struggles in law firms .. 199
What integrated client intelligence reveals ..... 200
Market intelligence – objective and subjective ..... 205
What firms need to do: five moves ..... 207
A self-assessment for leadership, and what to do first ..... 208
A culture, not a project ..... 209

**Chapter 15: Succession planning – ensuring client continuity when leaders retire** ..... 211
*By Ida Abbott, founder, Ida Abbott Consulting*
Developing an effective client succession and transition process .... 212
The firm's interests ..... 213
The client's interests ..... 214
The retiring lawyer's interests ..... 214
The successor partner's interests ..... 216
Preliminary steps ..... 217
Designing the client succession and transition process ..... 219
Conclusion ..... 226

**Chapter 16: Partner compensation and incentives – how compensation models influence BD behaviors** ..... 227
*By Tim Corcoran, principal, Corcoran Consulting Group*
Finding the motivation ..... 227
The maths aren't mathing ..... 232

"Increase leverage and partner profits increase, if all else remains the same" ..... 234
Penny wise, partner foolish ..... 235
"Consider a team performance-driven firm. Everyone benefits if anyone's performance improves. Partners help one another." ... 236
Success is effortless ..... 236
In money matters, only money matters ..... 238
The origin of origination ..... 241
Don't hate the player, hate the game ..... 246

**Chapter 17: Digital presence and online reputation** ..... 251
*By Jaron Rubenstein, tech strategist, Rubenstein Ventures*
Defining your target audience and personas for amplification ..... 252
Your firm website – a strategic asset ..... 255
Lawyer visibility via SEO and GEO ..... 257
Social media strategies for practice and firm elevation ..... 257
Measuring digital performance – the mandate for data analytics ... 258
Creating a culture of publication and self-promotion ..... 259
Assessing your firm's maturity ..... 259
Law firm digital maturity and reputation assessment tool ..... 260
Prioritizing for maximum impact ..... 261

**About Globe Law and Business** ..... 263