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# Executive summary

What does it take to develop and sustain a culture that values marketing, business development, and client care as shared responsibilities across the firm?

Now more than ever, firms are recognizing that isolated efforts, such as one-off trainings, CRM implementations, or inspirational retreats, won't transform behaviors. What's needed is a holistic approach driven from the top.

Through practical frameworks, candid interviews with firm chairs and CMOs, and real-world examples, this book shows how to empower professionals at every level to contribute to the firm's brand and growth. Not only does it demystify how a strong marketing culture is built – from leadership vision and governance to talent development, systems, and incentives – it helps readers understand how to do this in the context of complex, partnership-based environments.

Introduced by the book's editor, Deborah B. Farone, the book is split into four parts. Part one looks at core marketing and business development. In chapter one, Deborah looks at how to build a firmwide marketing strategy, aligning marketing goals with the firm's vision and its clients' needs. She firstly looks at why a firmwide strategy is needed, what can go wrong without one, and then looks at how to start – from client development priorities to how the company wants to position itself. She then explores how to get buy-in for such a strategy, and ensure long-term alignment. Before concluding with ten steps to build an integrated marketing strategy, Deborah maintains that such strategy is “a practical necessity for any firm that is serious about growth ... and about creating an environment where talented lawyers at every stage of their careers can develop and thrive.”

In a crowded legal marketplace where many firms claim similar strengths – client service, responsiveness, and deep expertise – true differentiation is difficult to articulate and even harder to sustain. Chapter two by Brandie Knox explores how law firm leaders can define a clear brand position grounded in strategy rather than marketing language. Drawing on more than

two decades of experience advising law firms on brand and digital strategy, Brandie outlines a practical framework for developing meaningful brand positioning. The chapter begins with the discovery process – examining how firms are currently perceived by internal stakeholders, clients, and the external marketplace. Through structured interviews, competitive analysis, and internal alignment exercises, leadership teams can identify the gap between current perceptions and the firm’s desired market position. The chapter provides practical tools and frameworks – including interview approaches, brand personality mapping techniques, and messaging pillars – that firms can use to clarify their value proposition.

Part two then gets into the tactics of business development strategy.

Chapter three realigns client relationships from episodic to strategic. JeanMarie Campbell provides law firm leaders and BD professionals with actionable frameworks that deepen trust with key clients, moving from a relationship “owner” mindset to a “client as our partner” mindset. Building a firm-wide key client account program that is scalable and practical is a business imperative, as clients are not simply sources of revenue, they are the firm’s most important long-term strategic asset. Client relationship management skills are not soft, but instead strategic, skills that lawyers need to hone and practice. Firms that institutionalize client relationship management outperform peers in client retention, cross-selling/servicing, and reputation. The firms that win will be those that treat clients not as matters, but as long-term partnerships, intentionally, measured, and evolving.

Chapter four then reframes cross-selling as cross-investing – a disciplined, strategic approach to collaboration that breaks down silos and drives sustainable revenue across practices and offices.

Most firms struggle with cross-selling because the work is misunderstood. It’s not about pushing services internally – it’s about building shared value, aligning incentives, and creating a culture where partners invest in each other’s success. Drawing on Julie Henson’s experience advising managing partners and integrating lateral teams, the chapter explores why cross-selling fails – lack of trust, unclear structures, and compensation models that reward individualism – and how leading firms overcome these challenges. The chapter highlights how cross-investing strengthens the entire ecosystem, incorporating shared accountability, shared intelligence, and shared opportunity. When firms shift from transactional referrals to intentional collaboration, they unlock deeper client relationships, more effective lateral integration, and meaningful revenue expansion. Ultimately, this chapter

argues that cross-investing isn't a program. It's a growth mindset – one that modern firms must adopt if they want to compete, adapt, and scale in today's legal market.

In chapter five, Heidi Gardner and Ivan Matviak build on these insights, focusing on the importance of network analysis. They explore the business case for smarter collaboration and why data and analytics are essential – from analysis to insights to action. The chapter looks at collaboration analytics from five different angles – firm, sector, practice, client, and partner – and the cross-functional collaboration required to deliver all of this.

Building a law firm culture that prizes original thought leadership has never been more important. As AI takes over more routine work and can answer basic questions, law firms need to demonstrate insights and build trust, positioning them for strategic, high-level work.

The good news is that AI can help them do it by freeing up more time and providing new tools to generate content. But it's not as simple as it sounds. Law firms must find a way to get lawyers to view their work differently. Instead of merely serving as legal technicians, they need to become business advisors who can consider risks and opportunities for their clients in a broader context. They also need to recognize "BD" activities, such as thought leadership, as essential to client service – not merely "non-billable time". In chapter six, Jamie Diaferia and Andrew Longstreth talk to law firm CMOs who have developed cultures that reward thought leadership, whilst also considering what law firms need to know about building trust with clients in the new media landscape.

In chapter seven, Trish Lilley explores how lawyers can embed business development into their professional identity. At the core of that challenge is "purpose". Individuals pursue careers as lawyers for myriad reasons – developing a book of business doesn't top the list. Trish looks at ways in which lawyers can make BD fit into their own lawyering style, so that it feels natural rather than forced, and is something they do willingly rather than under duress. If we reframe business development effectively – as a core professional responsibility – we can more easily move beyond the pushback, the resistance, and the fear and apprehension that some lawyers experience when asked to "sell". This chapter offers helpful tips and tricks for firms seeking to embed client development holistically into lawyers' professional identities.

Part three of the book looks at developing human resources.

The legal profession has changed dramatically in recent decades. There are

more laws and regulations, new practice areas, exceedingly complex transactions and disputes, and increased specialization – complicated by the fact that more legal issues are multi-disciplinary. Technology has sped up the pace of work, communications, and the ability to generate work product while automating some practice areas, making room for non-lawyers to deliver certain services. The advent of artificial intelligence and its role in generating documents, analysis and strategy has further muddled how and what to learn.

Law is considered a ‘practice’ – a continual work in progress where ongoing learning is fundamental to keep current and develop the skills critical to law practice. However, the substantive law studied in law school is not sufficient to produce competent lawyers. Dynamic, complex modern law practice requires learning to act, work, and feel like a lawyer to become a professional with a strong professional identity. The process by which lawyers actually become effective practicing lawyers, however, remains something of a mystery.

The underlying assumption is that somehow, by osmosis or magic or grit, these qualities and abilities will manifest after law school. Magical thinking is not a viable strategy, so how does this transformation occur? The informal and incidental learning that takes place in the course of law practice fuel the process of moving from knowing the law to acting like a lawyer to being one. Chapter eight, by Diane Rosen and Natalie Loeb, looks at how mentoring, sponsorship and coaching can all help the lawyer gain the skillset and knowledge they need to be effective practitioners.

In professional services firms, business development is often framed through individual performance, incentives, or formal training. Chapter nine, by Allan Schoenberg and Renate Wagner, advances a broader and more durable perspective – sustained business development is rooted in firm culture, and culture is shaped, reinforced, and maintained through internal communications that are tied firmly to business goals. Readers will come away with the understanding that communications is not a downstream function or simply a distribution mechanism, but a leadership discipline that helps define how people understand their roles, collaborate across geographies, practices, and functions, and take shared responsibility for client relationships and outcomes. The chapter examines how strong internal communications strategy and execution directly influence morale, knowledge-sharing, firm cohesion, and ultimately client successes. The authors position internal communications as a strategic lever for building a firmwide

business development culture that transforms culture from an abstract concept into a competitive advantage.

Chapter ten explores the often-overlooked link between business development culture, psychological safety, and wellbeing in law firms. While firms invest heavily in BD strategy (training programs, compensation structures, CRM systems), many struggle to achieve sustained behavior change. The missing ingredient is rarely motivation or capability – it is safety. Drawing on neuroscience and real-world law firm dynamics, Renee Branson explains how threat-based environments (scarcity mindsets, zero-sum credit systems, chronic cognitive overload) suppress the very relational and collaborative behaviors that effective business development requires.

Renee’s chapter reframes common BD challenges – hoarding relationships, reluctance to cross-sell, avoidance of risk – as adaptive responses to unsafe systems rather than individual shortcomings. She offers leaders a practical lens for diagnosing when BD problems are actually culture and wellbeing problems, and why addressing psychological safety is not a “soft” intervention but a performance imperative. Her chapter concludes with actionable frameworks and leadership practices for designing BD cultures that support trust, shared ownership, sustainable growth and long-term wellbeing.

Part four then turns to operations and change management.

Chapter 11 positions AI not as a technical challenge but as a strategic opportunity for law firm leaders to fundamentally reimagine how they compete, differentiate, and grow. Rather than focusing on basic automation or efficiency gains, Jennifer Leonard explores how creative professionals can use AI as a co-intelligence to sharpen market positioning, deepen client relationships, and scale their impact during the transformative opening years of the AI era. The firms that will thrive aren’t necessarily those with the largest technology budgets, but those whose leaders foster a culture of experimentation and understand AI as a strategic thought partner for business development rather than merely an efficiency tool. The most creative professionals – those willing to experiment, learn, and iterate – will gain significant competitive advantage during this pivotal moment in the profession’s evolution.

Budgeting and ROI measurement sits at the heart of building a sustainable business development culture. It’s how you know whether or not your change management efforts have been successful, as well as how and when to refine your approach over time. Chapter 12 by Monica Rodriguez

Kuniyoshi positions budgeting and measurement not as isolated exercises, but as strategic tools for steering law firm investments toward measurable value despite the realities of limited data, lean teams, and uneven attorney engagement. The approaches and insights that Monica shares will be useful to any law firm undergoing the important work of building a business development culture – whether they are trying to change behavior among a small group of partners, shift the mindset of entire practices, or measure a large-scale program across hundreds of attorneys.

Lateral partner success doesn't start on day one – it starts before the first handshake. Chapter 13 by Jessica Grayson reframes lateral integration as a growth strategy that requires marketing and BD at the table throughout the entire process – identifying the right candidates, vetting their books of business, creating a great candidate experience, planning their launch, and building momentum that lasts. Drawing on real-world experience, this chapter gives law firm leaders practical frameworks for bringing their marketing and BD teams in earlier and more strategically. Jessica looks at how to use your firm's brand to attract top talent, conduct meaningful due diligence on portability, create an experience that wins candidates over, design business development plans before day one, execute market launches that actually work, and build integration systems that deliver real ROI. The bottom line is that lateral success is designed, not accidental. When you involve marketing and BD professionals as strategic partners (not just service providers) you reduce risk, set clearer expectations, help partners ramp up faster and get more consistent returns on your lateral investments.

Part five then explores the client-centric focus of a successful business development strategy.

Chapter 14 turns the focus to gathering insights to inform strategy and strengthen loyalty. Nat Slavin argues that most law firm business development challenges are not effort problems. They are intelligence problems. The data needed to drive better business development decisions almost always already exists somewhere inside the firm, but it is disaggregated and trapped in silos. Once it is integrated, it reveals five things firms cannot see otherwise – what clients actually want, how they think about cross-selling, why they would move work, the criteria that drive selection, and the areas where their needs are unmet. Each of these is a business development opportunity hiding in plain sight. Leadership's job is to integrate the intelligence, surface the patterns, and translate them into a business development strategy that reflects what clients have been telling the firm all along.

Chapter 15 explores succession planning and knowledge transfer as critical components of sustaining business development and ensuring continuity when firm leaders retire or transition out of practice. Ida Abbott examines why effective succession is vital to a firm's long-term health, client retention, performance and reputation, and how poorly managed transitions can jeopardize client relationships, goodwill, and institutional knowledge. The chapter considers the often-competing perspectives of the firm, clients, potential successors, and retiring partners, including client expectations for continuity and choice, the development and retention of future leaders, and the personal, financial, and cultural challenges that can create resistance to succession planning. Ida also addresses the particular risks succession poses to business development, such as loss of key relationships, stalled growth, and uncertainty around ownership of clients. Finally, the chapter outlines a practical framework for normalizing and managing retirement, clarifying expectations and processes, and establishing oversight and accountability.

Every law firm strategic plan declares that growing the business is a top priority and every stakeholder – particularly partners – must play a role in furthering this mission. However, in most law firms, a relatively small number of partners generate the majority of the firm's clients and matters. These partners are often among the highest paid partners. Firm managers are constantly exhorting all other partners to do more to grow their practices and the firm. Many firms employ marketing and business development professionals whose primary purpose is to promote the firm and support the lawyers' business development efforts. While many partners participate in training workshops, contribute thought leadership, and attend networking events, only a modest few make material progress each year in growing their practices. What can be done with those partners unable or unwilling to do more?

It might come as a surprise that our perceptions may be skewed and the familiar pattern repeated in so many law firms is not so much a battle to convert apathetic partners into hard-charging rainmakers, but a battle to overcome outdated partner compensation plans that impose significant and systemic barriers to generating more widespread business development success. In chapter 16, Tim Corcoran first highlights and reinforces the elements of law firm partner compensation plans that support business development efforts, and then unwinds the compensation plan elements that, in obvious and not so obvious ways, hinder partner business development efforts and even impose financial penalties on partners who are both

capable and committed to growing their practices. He addresses topics such as origination, credit sharing, client succession, leverage, pricing, and long-standing KPIs that, despite good intentions, create a minefield of unintended consequences.

Given the unique nature of law firm cultures, what works well in one law firm may fall flat in another. Tim aids readers in identifying the partner compensation plan elements that warrant a deeper look in their own firms.

A strong digital presence and online reputation are key to successful business development for lawyers at the individual, practice, and firm levels. Developing a proper strategy and enforcing it throughout your firm's culture are key to accelerating future growth. This final chapter by Jaron Rubenstein covers key topics firm leadership must consider, including how to leverage AI-driven tools and services to maximize effectiveness, before concluding with a self-assessment tool for firm leaders to assess the maturity of their firm's digital presence and a methodology to prioritize an implementation roadmap based on that assessment.

## About the editor

**Deborah Farone** has had the unique opportunity to play a seminal role in developing the best practices in professional services marketing by working with the most respected and demanding lawyers and management consultants in the world.

Her advisory practice focuses on working with law firms, legal technology companies, and individual lawyers in the US, Europe, and Latin America on business development strategy, and business development and marketing department creation. She is also highly regarded for her business development training sessions for all levels of lawyers, as well as practice groups. She has led strategic planning, and is an in-demand speaker at law firm retreats and workshops around the world.

Deborah is the author of two bestselling legal marketing books: *Best Practices in Law Firm Business Development and Marketing* (PLI, 2019) – a work based on more than 60 interviews with successful law firm leaders and marketers, general counsel, and innovators in the profession – and *Breaking Ground: How Successful Women Lawyers Build Thriving Practices* (PLI, 2026).

Heidi K. Gardner, PhD, Distinguished Fellow at Harvard Law School's Center on the Legal Profession, has called Deborah “the leading expert in law firm marketing. Not only has she studied this complex topic from the peak of the legal profession, her research into what works and what doesn't is priceless for anyone interested in growing their business.”

Over the past two decades, Deborah has carved out a niche by distinguishing herself as the chief marketing officer of two of the world's most prestigious law firms – Cravath Swaine & Moore LLP and Debevoise & Plimpton LLP. Prior to diving into the legal marketing profession, she honed her business development and communications skills by working at the global management consulting firm Willis Towers Watson. In her early days, she worked both in the new business department and as an account executive at Ketchum Communications.

Deborah has also been involved in the corporate and academic arena. She recently spoke at Travelers legal department and has also spoken at McKinsey

& Company. On the academic side, she has lectured at Columbia Law School, the University of Pennsylvania's Carey Law School, Cornell Law School, and Fordham Law School. She has served as an adjunct assistant professor on the faculty of New York University.

Deborah is an officer of the International Bar Association's Law Firm Management Committee, past president of the Legal Marketing Association's New York Chapter, and past chair of the Association of the Bar of the City of New York's marketing communications committee. She was a charter member of the Luxury Marketing Council and serves as an advisor to the Chairman of the Board of the New York Public Library.

Deborah was recently inducted as a Fellow in the College of Law Practice Management. She has also been honored with the Legal Marketing Association's Legacy Award, in recognition of making "a distinguishable mark on the chapter and the profession", and is one of a few members named to the LMA's Hall of Fame. In addition, she was an honoree at the YWCA's Women Leader Luncheon and serves as a member of the organization's Academy of Women Leaders. For many years, Deborah served on the Board of Directors of The Girl Scouts Council of Greater New York.

Deborah has a B.S. in Marketing and Mass Communications from Boston University's College of Communications, graduating magna cum laude. Upon graduation, she was the recipient of the College's Alumni Award for Student Excellence and a member of Psi Chi, the International Honor Society in Psychology. While as an undergraduate, she served as a teaching assistant for courses in marketing and in psychology.

## About the contributors

**Ida Abbott** is a retirement strategist who helps lawyers design happy and purposeful retirements and helps law firms design respectful and effective succession and retirement processes. She is an internationally recognized expert on legal talent and career development, especially mentoring, leadership, and – her current focus – retirement. Before becoming a consultant to law firms, Ida practiced law for 20 years. In recognition of her lifetime contributions to the legal profession, she was elected a fellow of both the American Bar Foundation and the College of Law Practice Management. She is an advisor, coach, speaker, and author of several seminal books, including *Retirement by Design*, named one of the best retirement books of 2020 by *The Wall Street Journal*.

**Renee Branson** is a resilience strategist, author, and international speaker who works with law firms and professional services organizations to strengthen performance through wellbeing, psychological safety, and trauma-informed leadership. She is the founder of RB Consulting, where she advises firm leaders on how resilience and organizational culture impact decision making, collaboration, and long-term business success. With a master's degree in counseling psychology, Renee spent nearly two decades working with survivors of trauma and crisis before bringing her expertise into the legal profession. Her work bridges neuroscience, behavioral science, and leadership strategy to help organizations reduce burnout, strengthen trust, and improve team performance. Renee speaks globally on the economics of wellbeing and the neuroscience of high performance, and collaborates with law firms in the United States, the United Kingdom, and Australia.

As chief marketing and business development officer at Jenner & Block, **JeanMarie Campbell** leads client growth initiatives that focus on driving revenue and elevating the client experience. Her work includes developing strategic marketing and branding campaigns to enhance market visibility while fostering a culture of innovation and teamwork. As a former practicing

attorney for over nine years and with over 25 years of experience in client development, key account management and marketing roles, she brings a proven ability to contribute to strategy execution and strengthen client relationships. By leveraging her expertise in leadership, marketing strategy, account management and client development, JeanMarie aims to align initiatives with a law firm's broader objectives and deliver impactful client solutions. She enjoys writing and speaking on topics including leadership, client relationships, business development/marketing, and coaching for high performance. JeanMarie works with various law schools on their adjunct curriculum around marketing and business development. She is a certified executive coach and has a passion for coaching lawyers on business development, leadership, and career development.

**Tim Corcoran** guides law firm and law department leaders through the profitable disruption of outdated business models. Tim is a former CEO, a Fellow and past trustee of the College of Law Practice Management, past president and Hall of Fame member of the Legal Marketing Association, an American Lawyer Research Fellow, a past Teaching Fellow in the Master in Legal Business program at the Australian College of Law, a frequent keynote presenter and workshop facilitator at lawyer retreats and legal conferences, and a writer whose articles and commentary are published regularly in leading legal trade publications. Tim resides in the US and travels regularly to his global client base.

**Jamie Diaferia**, founder of Infinite, counsels leading professional services firms on their media, litigation, and crisis communications strategies. For 25 years, he has worked behind the scenes on many of the most significant stories in the news. In 2024 and 2025, *PRNews* recognized Jamie in its "People of the Year" award in the "Crisis Managers" category, which honors "standout communicators who have led overall communications efforts during a crisis, have proven their ability to protect an organization's reputation, and stay on message during a crisis". *PRNews* also included him among the "50 Game-Changers of PR" in 2017 and *Business Insider* recognized him on its 2020 list of the "19 top public relations experts CEOs scramble to hire in a crisis". Jamie has been named one of *Lawdragon's* "100 Leading Legal Consultants and Strategists" every year since 2016 and has been ranked by *Chambers* in its Communications supplement since 2018. Before founding Infinite, Jamie was a journalist and lawyer.

**Dr Heidi K. Gardner** is a Distinguished Fellow at Harvard Law School and former professor at Harvard Business School, and a globally recognized authority on organizational performance. She is CEO of the research and advisory firm Gardner & Co, and has been named by Thinkers50 as one of the world's most influential leadership experts. Heidi is the bestselling author of *Smart Collaboration and Smarter Collaboration*, and has published more than 100 books, articles, and case studies. Her research has earned the top honors in her field, including awards from the Academy of Management, and has been selected more than ten times for Harvard Business Review's "Best of" collections. A Fulbright Fellow and former McKinsey consultant, Heidi has lived and worked on four continents. She holds a BA in Japanese from the University of Pennsylvania, a master's degree from the London School of Economics, and a second master's degree and PhD from London Business School.

**Jessica Grayson** is chief growth officer at Stradley Ronon, where she leads the firm's lateral partner and group acquisitions and integration, business development, and marketing initiatives. Under her leadership, the firm has achieved record lateral growth, expanding its capabilities, market reach, and geographic footprint. A member of the firm's management committee, Jessica works closely with firm leadership to drive financial growth, enhance market presence, and ensure seamless integration for incoming talent. Prior to joining Stradley Ronon, Jessica led lateral partner acquisitions and integration at an Am Law 10 firm and held C-suite marketing and business development roles at two New York City-based firms. She currently chairs the Law Firm Advisory Committee for the National Association of Legal Search Consultants (NALSC) and previously served on the Executive Committee of the Legal Marketing Association (LMA) Northeast Region Board.

**Julie Henson** is a growth strategist and chief growth officer at Decipher Investigative Intelligence, where she advises law firm leaders on revenue growth, talent strategy, market expansion, and competitive positioning. With more than 20 years of experience in the legal industry, she works closely with managing partners, executive committees, and c-suite leaders to help firms grow with greater precision and long-term alignment. Previously serving as chief client officer for an Am Law 100 firm, Julie led firmwide initiatives focused on client development, cross-investment, leadership engagement, and strategic expansion. She is known for helping firms identify high impact

growth opportunities through data, market intelligence, and relationship strategy while strengthening collaboration across practices and offices. Julie regularly counsels firms on lateral growth, client investment strategies, leadership alignment, and the evolving business dynamics shaping the future of the legal industry.

**Brandie Knox** is founder and principal of Knox Design Strategy, a brand and digital strategy firm advising law firms. She helps firms clarify their positioning and create meaningful digital experiences for clients, prospective clients, and internal teams. Her work spans both external and internal law firm initiatives – from brand strategy and websites to knowledge management systems that help attorneys and staff access information and collaborate more effectively. With more than two decades of experience, Brandie previously managed the brand and design team at Shearman & Sterling (now A&O Shearman) before launching Knox Design Strategy in 2009.

Brandie is also the founder of Moxx, a digital case notebook designed to help litigation teams organize evidence, build case narratives, and collaborate more effectively throughout the lifecycle of a case. She brings a strategic perspective to brand positioning, helping law firms turn differentiation into something clients, prospective clients, and internal teams can see, understand, and trust.

**Jen Leonard** is the founder of Creative Lawyers, a company that works with legal leaders to drive creative solutions that respond to an era of significant change. Before launching her company, Jen was the first chief innovation officer and executive director of the Future of the Profession Initiative at Penn Carey Law School. At Penn Carey Law, Jen has taught Modern Law Firm Business Strategy, Design Thinking for Lawyers, and Generative AI in Law Practice. She has also taught design thinking to senior executives in Wharton's Executive MBA program. She hosts several podcasts, including *Fast-Tracked: Emergent Issues in the Legal Profession* (Practising Law Institute) and *AI and the Future of Law* (co-hosted with Bridget McCormack, president and CEO of the American Arbitration Association). She was named to the ABA's Women in Legal Tech list of honorees in 2024 and serves on the Board of Pro Bono Institute. Jen practiced law for ten years after graduating from Penn Carey Law.

**Trish Lilley** is an established leader in the legal industry with more than 25 years' experience shaping growth strategies for both US and global firms from 250 to 850+ attorneys and nearly \$1B in annual revenue. She has led large-scale functional and cultural transformations across client development, marketing, employee relations, and communications. As chief marketing and business development officer at four Am Law firms, Trish is recognized for architecting modern, data-driven business development functions that align client needs, market intelligence, and firm capabilities to drive measurable results and position these functions as strategic engines for revenue and relationship expansion. Her work emphasizes practical innovation – integrating technology, analytics, and cross-functional collaboration to identify opportunities, strengthen client engagement, and accelerate growth. A frequent contributor on legal industry trends, Trish is widely regarded as a forward-thinking, insightful voice on how firms can modernize operations and growth strategies. She speaks often at industry conferences and law schools and has been published and quoted in various outlets, including *The American Lawyer* and *The New York Times*. Her work has been recognized for impact and innovation by the Managing Partner Forum, *The New York Law Journal*, the Web Marketing Association, and others.

**Natalie Loeb** is founder and co-CEO of Loeb Leadership, a leading coaching and development firm with 100+ consultants across the US and Europe. A visionary entrepreneur and seasoned female business leader, she has built a family owned company from the ground up and brings over 30 years of expertise in talent development, executive coaching, and organizational transformation. Previously on the HR team at Skadden, Arps in New York, Natalie designed leadership academies and coached senior leaders – experiences that inspired her to found Loeb Leadership in 1997 to cultivate self aware, resilient, and inclusive leaders. She partners with senior teams to reshape culture, design workplace inclusion initiatives, streamline roles and processes, and deliver scalable leadership programs. Natalie holds an M.S. in Industrial/Organizational Psychology, executive coach training from Baruch College, and certifications in 15+ assessment tools. A prolific writer and sought after speaker, she is PLI faculty, authors the Coach's Counsel column, and co authored *Beyond the Courtroom*.

**Andrew Longstreth** is head writer at Infinite, an award-winning international communications firm. A former journalist with Reuters and *The American*

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**Ivan Matviak** is the co-founder and CEO of Smarter Collaboration International, where he leads the development of research backed technology that strengthens organizational collaboration and performance. He is the co author of the bestselling *Smarter Collaboration*, and a frequent contributor to *Harvard Business Review*, translating rigorous research into practical tools for leaders. Ivan previously served as president and chairman of Princeton Financial Systems, and as an executive vice president at Clearwater Analytics and State Street Bank, where he led global data, analytics, and fintech businesses. He has also advised Boston Consulting Group and Warburg Pincus on strategy, technology, and organizational effectiveness. Earlier in his career, Ivan held roles across Europe, Africa, and the United States at the Bank of Scotland, and Bain & Company. He holds degrees from the University of Pennsylvania, the Wharton School, and the Lauder Institute.

**Monica Rodriguez Kuniyoshi**, former chief marketing officer at Gunderson Dettmer, is the principal of MRK Strategies LLC, advising law firms on adoption, behavior change, and growth. With more than 25 years of experience, she is known for building and leading high-performing marketing and business development teams, supporting significant firm growth, and driving initiatives that strengthen client engagement and market position.

Drawing on a background in organizational development, Monica focuses on aligning attorney behavior with firm strategy to help leaders translate investment in marketing, technology, and talent into sustained adoption, stronger collaboration, and measurable business outcomes. She is also an advocate for the responsible use of AI and data-driven innovation to enhance client service, deepen relationships, and unlock new opportunities for growth.

**Diane Rosen** is an experienced coach, organizational consultant, training professional, lawyer, and mediator. She is the founder and president of dr2 Consultants LLC, which helps organizations, teams, and individuals achieve their goals, enhance existing resources, improve and optimize performance, manage transitions, support leadership development, and experience the extraordinary. Diane began her career at Weil Gotshal & Manges and Skadden Arps Slate Meagher & Flom, and maintains a private mediation practice in

New York. She was formerly counsel to Herrick Feinstein LLP and Ortoli Rosenstadt LLP where she handled real estate and corporate transactions. Diane has served on many non-profit boards and was the founding vice president of Girls Learn International, a non-profit organization that works to combat the global crisis in girls' education.

**Jaron Rubenstein** is a digital marketing technology innovator, software engineer, technology strategist, and proven business leader who brings deep operational, marketing, and data security expertise to professional services organizations. Jaron excels at aligning technical vision with business goals, building on decades of experience delivering sophisticated marketing technology solutions to leading law firms. Jaron is the founder and former CEO of RubyLaw, a legal marketing technology SaaS platform that powers websites, manages experience data, generates marketing documents for proposals and presentations, and ensures the integrity of digital content for law firms of all sizes. He established RubyLaw as the most modern marketing technology innovator, set the strategic vision, led the product and technology strategy, and grew RubyLaw to a significant share of the Am Law 200 market. In his current roles as a consulting CTO and chief AI officer, Jaron is designing and building the next generation of AI-enhanced digital marketing and business agents.

**Allan Schoenberg** is chief communications officer at Vinson & Elkins, where he leads the firm's brand strategy, media relations, internal communications, rankings, and digital media. He oversees an integrated, multi-channel communications platform designed to strengthen the firm's reputation through strategic storytelling, thought leadership, and market positioning. Before joining Vinson & Elkins, Allan held senior communications leadership roles at Nasdaq, CME Group, Bloomberg LP, and Accenture, building deep expertise in business-to-business communications and complex, highly regulated industries. He specializes in aligning communications strategy with business objectives, managing high-stakes issues, and leveraging data-driven insights to drive engagement and growth. Under his leadership, the communications function has become a strategic partner in advancing the firm's culture, visibility, and competitive advantage.

**Nat Slavin** is the CEO of ClientSignal, the AI-driven client intelligence platform for law firms, and founder and managing partner of Client Insight

Ventures, its consulting arm. For more than three decades Nat has been at the center of important conversations between law firms and their clients. As founder of one of the legal industry's leading client feedback practices, Nat has conducted thousands of confidential conversations with corporate counsel, general counsel, and C-suite executives, uncovering what clients really think about their law firms, what drives loyalty, what reveals competitive intelligence, and what puts relationships at risk. He has led the creation of client experience and service programs at firms across the Am Law 200 and regularly collaborates with firm leaders on client team strategy. Across both ventures, Nat brings the voice of the client directly to law firm partners, client teams, and firm leadership to inform and advise on business development and client growth strategies. Nat is an elected fellow in the College of Law Practice Management and a Legal Marketing Association Hall of Fame inductee.

**Renate (Ren) Wagner** is the director of internal communications at Vinson & Elkins, where she helps lead firmwide communications and engagement initiatives that support connection, culture, and strategic alignment across the organization. Since joining the firm in 2003, Ren has held roles spanning marketing, talent, inclusion, and employee engagement. In her current role, she oversees internal communications platforms and content, including a daily firmwide newsletter and the firm's intranet, and supports communications related to talent, recruiting, learning and development, benefits, and firm initiatives. She collaborates closely with leadership and cross-functional teams across communications, branding, business development, HR, and talent functions. Prior to joining Vinson & Elkins, Ren worked in communications for the American Airlines pilots' association and operated her own full-service design studio serving clients across multiple consumer and B2B industries.

# Introduction

When I was first approached about putting together this book, I knew one thing right away – I did not want it to be another collection of generic advice about marketing, rainmaking, or business development formulas. There are already plenty of articles and conference panels offering easy answers to hard questions. Most law firm leaders know the basics. They know that relationships matter. They know that collaboration matters. They know that culture matters.

What they often struggle with is the harder part – how to actually build an environment where those things happen consistently, not just on a good day or in a strong quarter.

As I thought about what this book could be, I kept coming back to a practical question. If the chair of a law firm called me and said, “We want to strengthen our business development culture. Who are the smartest people you know to help us think this through?”, who would I recommend? This book is my answer to that question.

Every contributor was chosen not simply because they are knowledgeable, but because they have lived these issues inside sophisticated, demanding professional environments. These are people I would trust to sit across the table from firm leadership and help them tackle some of the most important challenges facing law firms today, from client relationships and branding to AI, succession planning, psychological safety, thought leadership, digital reputation, internal communications, and cross-practice collaboration.

What emerged from their chapters was something even richer and more interconnected than I had originally expected.

At first glance, the topics may look unrelated. Branding. Culture. AI. Budgeting. Succession planning. Thought leadership. But as the chapters came together, several themes surfaced again and again.

*The first is that business development is no longer a side activity.* It cannot sit exclusively inside a marketing department or rest on the shoulders of a handful of rainmakers. Business development increasingly reflects the culture, leadership, systems, and behaviors of the entire institution. It is an essential factor of how law firm lawyers must think, on a daily basis.

*The second is that collaboration has become a strategic necessity, not just a nice aspiration.* Clients expect firms to work seamlessly across practices, offices, and disciplines. They assume lawyers inside a firm know one another, trust one another, and can bring the right resources forward efficiently. When firms fall short of that, clients notice, even if lawyers do not.

*The third is trust.* Again and again, contributors returned to the idea that trust is the foundation on which sustainable business development is built. Trust among partners. Trust between lawyers and clients. Trust between leadership and the broader organization. Several contributors approach this from different angles, including culture, psychological safety, communications, client teams, and succession planning, but the underlying principle is remarkably consistent. Firms grow more effectively when people feel safe sharing relationships, ideas, opportunities, and credit.

*Authenticity is another theme that runs through nearly every chapter.* One of the greatest misconceptions in professional services is that successful business development requires lawyers to become someone they are not. In reality, the most effective business developers tend to be those who find approaches aligned with their personalities, strengths, and values. Sustainable business development is not performative. It is relational. It depends on curiosity, generosity, responsiveness, consistency, and credibility far more than charisma.

*Technology and AI also appear throughout these chapters, not simply as operational tools, but as forces reshaping the competitive landscape.* As routine information becomes increasingly commoditized, differentiation shifts toward judgment, insight, interpretation, creativity, and human connection. In many ways, the rise of AI makes the human dimensions of professional relationships more important, not less.

*Finally, nearly every contributor touches on leadership.* Business development cultures do not emerge by accident. They are modeled, reinforced, incentivized, communicated, and protected by leadership. Lawyers pay close attention to what leadership rewards, tolerates, ignores, and celebrates. If collaboration, innovation, thought leadership, mentoring, and client service are truly priorities, lawyers need to see those values reflected consistently in firm systems and behaviors.

Throughout my career, both inside law firms and later as a consultant and author, I have seen firms invest enormous sums in marketing initiatives, technology, retreats, and strategic plans. Some succeeded brilliantly. Others struggled, despite significant resources and real talent. Often, the difference

was not intelligence or ambition. It was alignment. The firms that thrived understood that business development is not a collection of activities. It is an ecosystem.

My hope is that this book offers practical ideas, frameworks, and inspiration for leaders who want to build stronger firms and stronger client relationships in a profession that continues to evolve rapidly. More than anything, I hope it encourages leaders to think about business development not as selling, but as one of the central expressions of culture, trust, service, and leadership inside a modern law firm.

**Deborah B. Farone**

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