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# LEGAL MANAGEMENT

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## the MAIN EVENT(S)

Firm-hosted events can have a big payoff – or come with a hefty price tag if they don't provide enough value



More than a quarter of law firms view event sponsorship as a key business generation method, according to the 2012 Legal Marketing Survey Report from legal forum website Avvo and blog provider LexBlog.

BY ERIN BRERETON

"Most attorneys still understand the significance of meeting and interacting with people in person," the report noted. Firms also seem to view staff appreciation events as important – and with good reason: 63 percent of companies that measure the return on investment (ROI) of recognition programs saw productivity increase as a result. And according to the Society of Human Resource Management (SHRM), 58 percent had a higher profit margin return.

While planning an employee or client appreciation and recruitment event isn't easy, measuring its success can be even more challenging. Find out what steps to take to maximize the ROI of your firm's next event, and make sure that it's a smashing success – before you send a single invite.

### TEAMBUILDING EVENTS

Company culture can have a big effect on employee retention. In fact, 47 percent of workers identified a positive corporate culture as a key component of employee satisfaction, according to a 2012 SHRM survey. Firms may see a financial payoff, as well. A 2003 Towers Perrin Talent Report found that companies with highly engaged employees beat average revenue growth in their sector by 1 percent.

To create a successful event-based employee recognition and reward program, consider the following suggestions:

**Respect employees' work and other demands.** Dallas-based law firm Klemchuk Kubasta LLP, which handles both billable hour and flat-rate work, tries to strike a balance between its employee appreciation events and appreciating employees' work/life balance. The firm, which sponsors an annual ugly Christmas sweater

lunch and chili cook-off, often schedules workday celebrations toward the end of the day and stresses leadership's support.

"It's a challenge," said Director of Marketing and Business Development Jennifer Bergman. "If the partners are engaged and excited and walk around to make sure everyone is coming, it helps bring the rest of the employees together."

**Plan activities that unite employees.** At Klemchuk Kubasta's summer barbecue-picnic-bash, partners hand out awards based on themes, such as what song would represent an employee. At the holiday party, employees create humorous partner presents. "We like to, instead of just throwing a party where you eat and drink, have some sort of engagement," Bergman said. "It makes employees more interactive with each other and the partners."

**Give back through group activities.** Firms with small budgets may be able to build employee bonds – and help out their community through charity work.

"I do lot of work with the non-profit sector, and we're seeing that a lot of companies find value in doing volunteer work together," said Gail Bower, President of Philadelphia-based Bower & Co. Consulting LLC. Bower, who's helped produce events for corporations and former President Bill Clinton's inaugurations, said nonprofit work can help firm leadership build a stronger relationship with staff.

## EDUCATIONAL AND NETWORKING EVENTS

Eighty-one percent of firms have found career development and training opportunities are a popular benefit that can be used in lieu of monetary compensation, according to a 2008 Robert Half Legal study. However, educational programs don't have to just be firm-only events. Firms like Cincinnati-based Keating Muething & Klekamp have found that sponsoring informative sessions can help strengthen internal and external relationships.

A few factors to consider:

**Educational events can offer value.** Keating Muething & Klekamp, PLL hosts a free annual continuing legal education (CLE) program in December for current and prospective clients, attorneys in solo or small practices who serve as referral sources, judges and their legal staff, and the firm's staff. The firm has sponsored the event for more than 20 years and offers other CLE programs throughout the year. ROI isn't always easy to measure in quantifiable terms – but Keating Muething & Klekamp feels the overall effect is positive.

"We strongly believe that the effort is worthwhile, in terms of keeping our clients apprised of new developments in the law, strengthening relationships through personal interactions ... and allowing us to make helpful introductions and connections," Director of Marketing Susan Kurz said.

**There can be value in exclusivity.** For the past decade, New York elder law and estate planning law firm Ronald Fatoullah & Associates has hosted an annual invitation-only education and networking event for industry professionals and referral sources. Attendees receive updates on legal changes in elder law and Medicaid eligibility.

"It's our way of giving back, and also our way of continually introducing the community to our firm and remaining connected to those who already know us," said Director of Marketing and Media Carol Schell.

The annual event, which had 300 attendees in 2013, costs several thousand dollars to produce. "As far as ROI, there is always a surge in business after, and the surge pays for more than the total cost of the event," Schell said. "We have smaller lunches, lectures and meetings in our offices throughout the year, but our main event is our biggest hit."

## CLIENT APPRECIATION EVENTS

Think client satisfaction is important? Consumers do. Eighty-one percent said they'd be willing to pay more for a better customer experience in a recent survey conducted by technology provider Oracle. Showcasing your firm's commitment and skill set at marketing-based events can help reinforce its value to current clients. However, truly successful client events involve more than just cocktails and conversation.

To maximize your firm's client appreciation events:

**Promote topics clients care about.** In-house counsel colleagues who attend Keating Muething & Klekamp's annual December CLE program can obtain required credit before the end-of-the-year deadline. "Topics are determined partly to ensure that the state's requirements for ethics, professionalism and substance abuse are offered," Kurz said. "But the general CLE topics vary, based on which are deemed most relevant to our clients."

Because several attorneys' work focused on the aviation industry, the law firm that event planner Nicole Matthews, CSEP, worked at for five years – before launching her event management firm The Henley Company, LLC – held an event on the tax and legal implications involved in personal and business private aircraft purchase and use.

"We partnered with other companies like insurance companies and Bank of America, and put together a strategic partnership event to educate clients from start to finish on how to purchase and use a jet," Matthews said. To increase the event's fun factor, it was held in an airplane hangar.

**Consider smaller events.** Client appreciation events don't have to be big affairs. Wealth management and financial planning firm Francis Financial hosts an intimate dinner with about 20 influencers, and clients provide valuable feedback that helps with firm planning.

"We discuss methods of communication, holding meetings over the phone or Skype, starting a financial education program for children – what they would like to see," said Maelis Mittag, Francis Financial's Director of Marketing and Client Relations.

In the wake of the Recession, some firms are shying away from lavish client appreciation bashes – and not just because of budgetary constraints. "There's a very fine line with professional service industry events," Matthews said. "You want to make sure clients feel appreciated and the event mirrors the firm's quality, but you also don't want it to be so elaborate that clients walk in and say, 'This is why I'm paying \$300 an hour.'"

## BUSINESS DEVELOPMENT EVENTS

Online advertising isn't the only way to market your firm: In fact, a quarter of law firms planned to spend less than 25 percent of their marketing budget online in 2012, according to Avvo and LexBlog's 2012 Legal Marketing Survey. More than half of respondents, however, said they planned to promote their work by speaking at events.

If your firm is considering using event marketing to recruit new clients, the following techniques may help:

**Develop partnership power.** For the past two years, Francis Financial,

which Mittig said has a 95 percent referral base, has sponsored an annual event with global law firm Duane Morris. The New York City-headquartered firm and Francis Financial have mutual clients, who are invited, along with CPAs, law firms, and other key referral partners and new business prospects. Two hundred people typically attend. The firm has been able to get most related costs, from alcohol to photography, covered by vendors.

"We invite a lot of super-connected, high net worth New York City influencers. It's such a great group of people that are attending," Mittig said. "It gives the sponsors a great place to showcase their product."

**Enact an event communication plan.** Bower said, "All attorneys need to be involved with the new business engagement," adding, "They need to be prepped on what they should be doing and talking with guests about."

It's not an uncommon practice: Seventy-seven percent of attorneys are involved with their firm's marketing efforts, according to the 2012 Legal Marketing Survey Report.

Francis Financial's staff reviews a PowerPoint presentation on upcoming event guests. Mittig suggests splitting up the list before the event. "It doesn't have to be a scavenger hunt checklist," she said. "But that way, everyone knows who's coming, who the clients are and who they should be talking to so you make sure everyone feels welcome."

**Teach subtle sales techniques.** "I see corporate sponsors all the time at events speaking at the podium about how great the company is, and it's boring," Bower said. "No one cares."

Schmoozing may not come naturally to firm members, but it's a worthwhile skill to help them develop. "The missing piece in law school is that young associates don't learn how to do business development," Matthews said. "Very few attorneys can be successful without cultivating clients."

**Track interactions.** If a firm is enacting a multi-tiered marketing plan, it can be hard to link specific results to just one event. "If you have somebody in the pipeline and they sign two weeks later, it might not be because they came to the event," Mittig said. "But [the event] definitely adds value."

Francis Financial logs client and potential client interactions in a detailed database. The firm assigns keywords that can be associated with each contact, based on meeting topics, conversations and other factors, which help it to determine who might be interested in upcoming events. Matthews suggests firms ask themselves the following: Three months after an event, have they seen an uptick in business? If not, what can the event team or attorneys do differently next time?

And don't be afraid to end events that just aren't working. "So often, people are afraid to let go of an event because clients may feel unappreciated," Matthews said. "At some point, somebody needs to say, 'Is doing a client appreciation event yielding anything for us?'"

**Establish ongoing contact.** "The tracking piece is definitely crucial, and so often, forgotten," Matthews said. "People show up for work the next day and say it was fun. There's no one holding anyone's feet to the fire in terms of what they got out of it."

After Fatoullah & Associates hosts its annual spring education event, the firm follows up by sending an e-mail event pictorial to attendees. Try following this approach by encouraging attorneys to send a personal e-mail or thank-you note to potential clients, followed by a call, to move the relationship they started at the event to the next level.

## THE VALUE OF GETTING PERSONAL

Social media marketing may be a hot trend; but it hasn't completely replaced live events. "People still crave an in-person, one-on-one relationship," Mittig said. "[Events are] your chance to shine in person." Additionally, while your firm's website can convey its experience, there's no substitute for personally showcasing your legal and administrative staff's competence and charm.

"For a professional service like a law firm, you're not selling something tangible," Bower said. "You're selling intelligence capital, which is intangible, invisible — and highly valuable."

## About the author

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From Francis Financial's annual event with global law firm Duane Morris. Images by Alexis June Creative.



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