



Hildebrandt Institute and West LegalEdCenter

present

Law Firm Marketing Metrics Workshop 2013

Marketing Analytics for Results: Using Metrics to Accelerate Your Profitable Growth

Event Chair

James J. Stapleton, Chief Marketing and Business Development Officer,
Littler Mendelson PC

Additional Faculty

Wendy L. Bernero, Chief of Strategic Initiatives, Proskauer

Robert Alston, National Sales Manager, Thomson Reuters

Josh Kluge, Business Development Specialist, Thomson Reuters

Brent Turner, Client Development Executive, Thomson Reuters

Stuart Dodds, Director, Global Pricing and Legal Project Management, Baker &
McKenzie

Carolee Swallie, Chief Business Development Officer, Brinks Hofer

Amy Wisinski, Strategic Research Manager, Winston & Strawn LLP

2013 Dates

June 10th - Chicago, IL

September 20th – New York, NY

**Unless otherwise stated, all sessions led by Stapleton and Bernero.*



AGENDA

8:30 a.m. – 9:00 a.m. Registration & Continental Breakfast

9:00 a.m. – 9:10 a.m. Introductions

- Facilitators
- Goals
- Process

9:10 a.m. – 9:55 a.m. The Setup: “If I wanted to be a salesperson, I wouldn’t have gone to law school.”

- How attorneys feel about numbers and process
- What motivates attorneys
- Teaching the right lessons
- Using metrics to model the correct behavior

9:55 a.m. – 10:40 a.m. What’s New? What’s Tried and True?

- Revenue targets
- Realization and profitability
- Win/loss ratios
- Prospecting: The Law of Large Numbers
- Market share
- Client share (cross-selling)
- Efforts: Business development hours and expenditures
- Impressions/Outreach: advertising, social media, public relations, web site, seminars, client events
- Net promoter score
- Client service
- Referrals
- Brand equity (visibility and favorability)

10:40 a.m.-10:55 a.m. Networking Break

10:55 a.m. -11:25 a.m. Group Exercise: Rate Your Attorney

- Attorney potential
- Obstacles and roadblocks
- Management by objective
- Firm goals/your goals/stretch goals



- Generating desired behavior patterns

11:25 a.m. -12:10 p.m. Five Year Case Study

12:10 a.m. - 1:15 p.m. Networking Lunch

1:15 p.m. - 2:00 p.m. Using Metrics to Map and Implement a Strategy

- Creating a baseline (where are you now?)
- Using metrics to plot your course and measure progress (Where are you going and how will you know when you get there?)
- Your role as leader, coordinator, coach and progress tracker (as well as travel agent and tour guide)

2:00 p.m. – 3:00 p.m. Best Practices in Mining External Data

(Alston, Kluge, Turner, Dodds, Swallie, Wisinski)

In today's competitive law firm environment, it is becoming increasingly important to mine external data and to convert that data into useful information for use in client development. Without the necessary data, it becomes difficult to identify and seize new business opportunities in the marketplace. This session will feature three panelists who will discuss the evolution of data needs, challenges in providing high-quality data to internal teams, and best practices and tools for mining data.

3:00 p.m. – 3:15 p.m. Networking Break

3:15 p.m. – 4:00 p.m. Applying Metrics in the Real World

Participants will be given a practice group scenario and will work in teams to analyze the practices' metrics and recommend a solution to its business challenges.

Teams will report findings and solutions to the group.

4:00 p.m. – 4:10 p.m. Closing Remarks and Adjournment