

# The Path of Discovery: Recreating Marketing — and Your Law Firm — to Transcend the Generational Divide

By Susanne C. Medley and Sarah J. Read

For many years, the four P's of marketing have guided even the most skilled marketers: product, place, price, and promotion. In the case of marketing professional service organizations, such as law firms, a fifth factor supersedes the traditional 4 P's. This factor is your clients – both current and potential. While the four P's are still important to the success of any successful marketing effort, what will truly determine long-term success is (i) how well your organization is connecting with your clients, (ii) how well your organization understands what is important to those clients, and then (iii) how committed your organization is to changing so that you can better align with your current and potential clients and meet their needs.

When was the last time that you conducted an analysis of your clients? Do you know who your most valued clients are now? Have you given consideration to who will they be five or ten years from now? Is your firm being affected by a generational shift in values or expectations? Will it be? If you represent corporate clients, who are the key decision makers now and who will they be

five or 10 years from now? How do your clients want to work with their lawyers, and is this changing? What do you need to do to maintain the strong relationships that will continue to bring you business? Only when you have a strong understanding of your clients and these critical issues can you begin to develop an effective marketing and business development strategy designed to help you achieve your desired results.

To build and capture this understanding of your clients, you need to conduct a thorough client analysis. This will require you to objectively look at your firm and honestly answer a series of questions.

- What are the demographics associated with your type of practice?
- What demographic data is available regarding the clients you serve? What does the data illustrate? For instance, do you serve clients from various generations? If so, which ones?
- How are demographic shifts within your area affecting demand for your practice?<sup>1</sup>
- Are there clients that you want to serve who you currently are not reaching? If so, why not?
- How would you define your organizational culture? Is it one in which younger clients will feel comfortable,

or might it be perceived as stuffy or inflexible?

• Next, how do you currently market your firm? Do you utilize a one-size fits all approach in hopes of reeling in some clients after you have spread your marketing net? What has and has not worked? Why or why not?

• What is your primary marketing message and how is it delivered?

Then you need to turn to your clients for insight and compare your version of reality with theirs. Whether you perform one-on-one interviews, focus groups, or surveys, you are specifically looking for answers to the following questions:

- What is important to your clients when seeking assistance from your firm?
- What are your clients' expectations when seeking legal advice?
- How does your firm perform in meeting these needs and expectations?
- Do answers differ depending on your clients' ages? Can you identify any trends or specific characteristics?
- Would changes in the areas of staffing or pricing, or offering new choices (e.g., training, unbundling, new services, etc.) better meet your clients' needs or expectations? If so, which ones?

Once you have asked the necessary questions and obtained the answers, it is time to analyze the findings and look for the gaps. In other words, where are there opportunities for your firm to better align with needs and expectations in an effort to improve and better connect with your current and potential clients?

First, as you are analyzing the data give particular attention to the demographic data. Are your clients representative of a particular age group? If so, what generational group do they primarily represent (e.g., GI Generation or Matures, Baby Boomers, Gen X, Gen Y or Millennials)? It is important to recognize that each generation tends to have a unique set of characteristics and they each have particular needs and expectations. As explained in the first article in this series (Sarah J. Read & Susanne C. Medley, *Effective Leadership in a Multigenerational Firm: Make a Difference*, 1 Precedent 44, (Winter 2007), older generations may prefer the status of being served by a partner, value personal attention, and rely heavily on their attorney for advice and guidance, while younger clients may be looking for a more collaborative approach and

**“Success . . . does not depend solely on your ability to listen to what your clients have to say and decipher what the data tells us, but rather on our willingness and commitment to act on what we discover.”**

prefer communicating electronically. Are you taking those needs and expectations into consideration in your marketing and business development efforts? The demand for different types of services will also vary by generation, as will the size of the population. Consider whether demographic changes in your area are threatening to erode your practice, or whether they present new opportunities that could be captured by

adding new practice areas complementary to those you now have.

Second, give consideration to what your firm can do to better position itself for the future. If your client base is primarily represented by Matures or Baby Boomers, what can you do to attract clients in Gen X or Gen Y so as to ensure that the firm is positioning itself for the future? Positioning may require an organizational culture change. If in your findings you discovered that your clients perceive your firm as very traditional, you may want to consider new ways of reaching out. This may involve more teaming with clients, assigning a range of attorneys knowledgeable about a case so as to ensure ready and continual access, or increasing your electronic capabilities (e-mail, websites, or working with electronic collaborative platforms). But regardless, do not ignore the need of Matures and Baby Boomers to receive personal attention, particularly from senior lawyers. You will also need to assess your firm’s readiness to change to meet the needs and expectations of a new generation.

Third, determine how you can market to meet your targeted generations.

Let the characteristics of the targeted client groups guide your marketing decisions. If you choose to target more than one generation, then you will need to do away with a one-size fits all marketing approach and create targeted marketing strategies and messages for each generation. For instance, if you are targeting Matures and Baby Boomers, you should probably include a mix of traditional media (radio, television, newspaper) with new media and web technology. For Gen X and Gen Y, you may choose to rely on

more cutting-edge technology, such as pod casting and blogging. If you do so, however, be aware that the ethical rules in this area are still evolving and you will need to carefully evaluate the risks and benefits involved.<sup>2</sup> Companies, such as hitwise.com, analyze generational usage of thousands of web sites and can provide insight regarding areas to consider when designing a web site that is targeted to specific generations.

As Oliver Wendell Holmes, Sr. once stated, “It is the province of knowledge to speak, and it is the privilege of wisdom to listen.”<sup>3</sup> To learn from our clients, we have to take a step back, check in with clients (both existing and potential), and be willing and ready to consider the good and the bad. Success, however, does not depend solely on our ability to listen to what our clients have to say and decipher what the data tell us, but rather on our willingness and commitment to act on what we discover. Are you ready to embark upon a path of discovery?

*In the next issue of Precedent, look for the third article in this three-part series, which will address recruiting and retaining the younger generations and also retaining restless Boomers.*

## FOOTNOTES

<sup>1</sup> Demographic information is available through the U.S. Census Bureau web site (www.census.gov). It is possible to locate specific state, county, and city (with populations of 25,000 or greater) information through this site. Keep in mind that it has been seven years since the last census was conducted. The U.S. Census Bureau does provide population estimates on this site as well. More recent information for Missouri can be found through the Office of Social and Economic Analysis

*(Continued on page 47)*

# Marketing

(from page 45)

([www.oseda.missouri.edu](http://www.oseda.missouri.edu)). Local information can generally be found through the county, city, and local chamber of commerce web pages.

<sup>2</sup>For the rules on attorney communications and advertising, see Mo. Sup. Ct. R. 4-1.4 and 4-7.1-3. Also see, for example, recent amendment to the New York rules on attorney conduct in this area, which took effect on February 1, 2007. Specifically see N.Y. Ct. App. R. 1200.1(k)-(l), 1200.6, 1200.7, and 1200.8. A redlined version of the rules can be found at [http://www.courts.state.ny.us/rules/attorney\\_ads\\_amendments.shtml](http://www.courts.state.ny.us/rules/attorney_ads_amendments.shtml)

<sup>3</sup> [http://www.quotationspage.com/quotes/Oliver\\_Wendell\\_Holmes/](http://www.quotationspage.com/quotes/Oliver_Wendell_Holmes/)



Sarah J. Read, a Baby Boomer, is an attorney in Columbia. She is also the president of The Communications Center, Inc., a consulting firm that works with law firms and businesses to improve communication skills, build better relationships, and work more effectively. For additional information, visit [www.buildingdialogue.com](http://www.buildingdialogue.com).



Susanne C. Medley, a Gen Xer, is the president and owner of the Customer Communication Group, an organizational effectiveness and communication consulting firm based near Jefferson City that assists organizations connect with their internal and external customers through strategic thinking and communication. For additional information, visit [www.thinkccg.biz](http://www.thinkccg.biz).