An Associate's Marketing Checklist by Year of Practice 3.0
By Ross Fishman, JD

Below is a step-by-step list of marketing activities that can turn anyone into a business generator.

As an associate, your goal should not be to bring in work, but to position yourself to get high-quality legal work when you need it, later. Gradually, over time, build a tight ~250-person network of people who hire lawyers, influence the hiring decisions, or refer business to them. Few clients will hire an associate for quality work, so spend these years building your resume, reputation, and name recognition among a significant, specific audience.

In the longer term, the shortest path to building a sustainable practice is to become an expert in a small industry or sub-subset of a larger industry -- clients declare "industry expertise" to be among the traits they value most in their lawyers.

Broad industries like real estate, banking, health care, insurance, and construction are too obvious; select a smaller, more obscure area where you have existing experience, interest, or contacts. The answer might not be obvious now; just recognize it when it comes along, and be proactive beginning in your fourth year.

Focus on helping people, not looking for work, so you are viewed as a knowledgeable industry insider, not a needy salesperson. Build close relationships and work will come. In all your networking, remember -- “It's better to be interested than to be interesting.”

First-Year Associates
Your first priority is to learn to be a great lawyer; marketing should be a distant second. Your primary marketing activity is simple: make sure you don't lose the people you already know.

- Join one local bar association or the ABA and get actively involved on one targeted committee within your practice area (continue through partnership)
- Read the firm’s website and brochures to learn about its range of services and clients. Develop relationships with attorneys inside and outside your practice area. Do not spend your career eating lunch at your desk. Go out at least:
  - Once each week with a lawyer inside your practice area
  - Twice each month with a lawyer outside of your practice area
  - Regularly with friends and contacts
- Draft a biography, following the firm's format. Update it regularly.
- Build your network. Create mailing list of friends and contacts:
  - Law school classmates
  - Fraternity and sorority members
  - High school and college friends
  - Community-association and professional-club contacts
- Keep in touch with your existing network through traditional tools and technology:
  - Events, newsletters, holiday cards, breakfasts, lunch, phone calls
  - LinkedIn, Facebook, Twitter etc. (see below)
- If you don’t have a Facebook page already, create one
  - Keep it casual but professional
  - Check it weekly, from home
  - Join your law school alumni Facebook group
  - Connect with your friends, especially those from law school
• If you don’t have a LinkedIn page already, create one
  o Fill it out completely, keep it professional
  o Check it twice-monthly, from home
  o Join your law school LinkedIn alumni group
  o Consider starting a group for your specific graduation year
  o Connect with friends and acquaintances, especially those from law school
  o Request professional Recommendations as appropriate
• If you don’t have a Twitter account, create one
  o Check it daily, from home
  o Post weekly on something relating to your job, or interest
  o Follow people within your legal and business areas of interest
• Sign up for at least two Google Alerts at google.com/alerts
  o For the Search Terms, use "your name" and "your firm’s name" (in quotes)
• Create a comprehensive Google Profile at google.com/profiles
  o Link it to your Facebook, LinkedIn, and Twitter accounts
• Before you engage in any social media (Twitter, Facebook, LinkedIn, etc.) read your firm’s social media policy
  o If the firm doesn’t have one, help write one

Second-Year Associates
Your first priority as a second-year associate remains learning to be a great lawyer; marketing is still a distant second. Stay in touch with your friends and contacts.
  • Continue the "First-Year Associates” activities, above
  • Continue adding new names to your mailing list, and LinkedIn and Facebook networks as you encounter them:
    o Bar association committee members
    o Your peers within client companies
    o People you meet at networking functions
    o Alumni-association contacts
  • Read bar association and legal profession trade magazines and law-specific blogs to improve your technical skills (continue through partnership)

Third-Year Associates
By now you’re getting a better handle upon your legal practice. Continue focusing on technical skills, but you can begin proactively growing your network.
  • Continue the First- and Second-Year Associates' activities, above
  • Build your resume by participating actively in your bar association within your area
    o Volunteer for a committee and work toward a leadership position
    o Write a brief article on an area of interest for a committee newsletter
    o Give a speech on an area of interest for a committee newsletter
  • Increase marketing efforts – devote some time each week to a proactive networking activity, including e.g. lunch, breakfast, dinner, sports, networking events, etc.
  • Read legal and targeted industry publications (continue annually through partnership)
    o Subscribe to blogs and follow people on Twitter from leaders in these industries
  • Add select client and prospect names to your Google Alert in quotes, e.g. "Fishman Marketing"
    o Use selective information as a reason to call, congratulate, or reconnect
    o Send clipped articles with brief handwritten note indicating "Congratulations" or "I thought you might find this of interest"
Fourth- and Fifth-Year Associates

Continue refining your legal skills. It is now time to start expanding your network and building your external reputation and resume. Remember that providing the highest-quality technical skills and extremely responsive client service are essential elements of the firm’s marketing to its existing clients.

Unless your practice area is driven through lawyer referrals (e.g. personal injury, divorce, patent, admiralty) you should now reduce your bar association activities and surround yourself with prospects, not competitors. It is time to focus your efforts more narrowly, particularly in some industry group or sub-specialty practice niche. Considerations in identifying the niche or industry to target include:

- Did you grow up in a family business?
- What hobby, passion, or special skill of yours would clients value?
- What job did you have before law school?
- What’s hanging on your walls or sitting on your credenza?
- Where do you or your spouse have an established network?
- What do you know that other lawyers don’t know that would benefit some category of clients?

To help you identify your narrow niche, visit a public library to review Gale Publishing’s multi-volume Encyclopedia of Associations.

- Browse through the easy-to-use 40,000-association directory to identify the best groups or trade associations serving your target industry. Look for a national association with an active local chapter.
- Call them to learn more about their members and request a membership kit
- If the membership includes legal-hiring decision-makers, consider joining the group

Once you have selected the group or trade association, your ultimate goal is to become one of the "usual suspects" in that group, a highly visible, friendly, helpful, active contributor:

- Attend the monthly meetings
- Network regularly, get to know everyone
- Be helpful, offer advice and assistance
- Spend a couple years learning more about the industry and the association members
- Keep the conversations focused on them:
  - Do 20% of the talking, mostly asking about them and their businesses
  - Remarkably, the more they talk, the smarter they think you are, and the more they like you
  - Be actively interested in them
- Do not seek work or sell your firm, or you will be shunned as a "vendor"

In addition:

- Learn about your clients’ and prospects’ companies and industries
  - Read industry publications and blogs regularly
  - Conduct online research periodically to stay current on their issues and needs
  - Browse company websites regularly, especially "What's New" and "Press Releases"
  - Follow them on Twitter
  - Create a Google Alert for each company and important individual
- Start maintaining an ongoing list of cases and/or deals, with one-paragraph summaries (whom you represented, what issues and dollars were involved, how it was resolved, how the client benefited, what was significant about it).
- Notify Marketing of significant cases and/or transactions you are involved in, or aware of, for media purposes
• Write an article for a legal or industry publication on new issues, trends or precedents
  o Tweet weekly on these issues
  o Post on blogs relevant to your area(s) of interest
  o Continue annually through partnership
• Present a speech to a legal, industry, or community association
  o Continue annually through partnership
• Help present a firm seminar to clients and prospects
• Continue updating your mailing list, and LinkedIn network, supplementing them with:
  o Opposing counsel
  o Your peers inside client companies
• Continue adding to your Facebook network with friends and less-formal contacts
• Engage in at least one face-to-face marketing effort per week – breakfast, lunch, dinner, drinks, sports, social event, seminar, conference, association meeting, etc.
• Provide Marketing with client-contact information for client-service activities
• Offer to host a meeting at the firm for a group in which you're active

Sixth-, Seventh-, and Eighth-Year Associates
Work with a practice-group leader to set annual business-development goals. Continue the activities listed above, supplemented with additional activities:
• Actively seek out a strong business-developing partner to serve as a mentor
• Meet with contacts at other professional-services firms (accounting, financial services, public relations, practice-area boutiques) to identify strategic-partnership opportunities such as mutual events, client teams, and referrals
• Work to a leadership position in your selected industry association
  o Use technology to help grow and stay in touch with your network, e.g. blogs, Twitter, LinkedIn, etc.
  o Consider half-page advertising in the industry publication
• Engage in at least two face-to-face marketing efforts per week
• Visit clients’ facility, offices, factory, or stores, at no charge
  o Dress appropriately for the location
  o Tour the plant, meet employees, ask questions
  o Become more familiar with their industry's legal and business issues
  o This is critical: do not sell

If you follow this simple checklist, over time you should find that you have developed a significant network of the right contacts whom you can turn into clients. Moreover, you will have laid the foundation for a successful career, one that is fulfilling personally, professionally, and financially. Remember, once you identify what you love to do, find a way to bring that into your practice, and you will spend your entire career absolutely passionate about your practice.