

ROLES & RESPONSIBILITIES

For Marketing, Business and Client Development in Most Law Firms

<u>ITEM OR ACTION</u>	<u>ATTORNEYS</u>	<u>MARKETING STAFF</u>	<u>SUPPORT STAFF</u>
Communicate with clients (ALL)	Primary	Annual satisfaction reviews	Greet by name, track
Client service & response (ALL)	Primary	Annual client reviews	2 hour response time, greet
Staying in touch	Primary – once a qtr.	Coach, remind, support	Support, auto-reminders
Client site visits	Primary + other team members	Prep and follow-up	Track
Taking clients to lunch	Primary	" "	Help track & follow-up
Holiday/greeting cards/gifts	Identify key ones and give	to Mkt. & Support staff to send	Auto-remind, order & send
Entertaining clients/contacts	Primary	Attys – prep w/ research Self – alumni, community events	Track all activities
Drafting proposals/attend pitches	Primary	Attys – prep w/ research, track & follow-up Intro as Client Service Director	
Target prospect lists		Research in tandem w/ library	If use, track
Trade/Industry Assn's	Join & participate	Help identify & leverage	Keep contacts current
Seminars	Prep, speak & follow-up	Help prep, attend & follow-up	Help prep, inventory & file
Speeches	" "	" "	" "
Articles	Prep & write	Help leverage, re-publish	Keep track
Newsletters	" "	" "	" "
Web Alerts	" "	" "	" "
Publicity	Interview w/media	Help ID media, prep & rel dev	Greet and inquire on subject
Community Activities	Join & participate	Help ID, join also & rel dev	Track and inventory activities
Year-end reporting efforts & results	2 page comp memo	Can review files & send memos	Review all tracked
Planning	Member of team	Coach and strategize	Run annual inventory of matters