Monday, July 15, 2019

Whether it’s because of a lack of communication, unclear expectations or different work styles, CMOs and firm management aren’t always on the same page. But even a strained relationship can be salvaged and corrected, says Iris Jones, Chief Business Development and Marketing Officer with McNees Wallace & Nurick LLC. She joined the Law Firm Marketing Catalyst podcast, hosted by Berbay Marketing & Public Relations Managing Principal, Sharon Berman, to talk about why CMOs need to become more than order takers; how attorneys can build deeper relationships; and why we should be teaching young lawyers about teamwork. Read the transcript below.

Sharon: Welcome to the Law Firm Marketing Catalyst. Today my guest is Iris Jones, Chief Business Development and Marketing Officer at McNees Wallace and Nurick, headquartered in Harrisburg, Pennsylvania, and the firm has seven offices. Iris practiced as a lawyer before segueing into business development. You only have to have a brief talk with Iris to tell that she is a real leader. Today, among other things, we’re going to be talking about leadership in law firms. In addition, at the recent Rain Dance Conference, which is put on annually by the Legal Sales and Service Organization, also known as LSSO, Iris was awarded this year’s Sales and Service Executive of the Year for the program she developed, and we’ll talk briefly about that. I’m pleased to welcome Iris Jones. Hello, Iris.

Iris: Thank you very much, Sharon, it’s good to be here.

Sharon: Iris, first can you tell us—I’m always curious about this—how did you segue from practicing law to spearheading marketing and business development for law firms?

Iris: I think it was a natural progression in terms of looking for ways to improve relationships with clients and with customers. I’ve always been on the customer service side of things, looking at the other person’s viewpoint, so it was quite easy. I had a relationship with some colleagues in Austin, Texas, and they were instructors with the WJF, William J. Flannery Institute, and I had the opportunity to work with Bill and to become an instructor on client development relationship management in the early 2000s. He was only working with practicing attorneys who could train and further educate and coach partners around the U.S., and I was delighted to be part of his team and to work with him in that training. Of course, it taught me a great deal, but I felt like I’ve always been a natural rainmaker. When I was practicing law prior to that time, I was pretty good at it. I think it’s all about the people skills, the relationship building and the networking opportunities that you allow yourself to engage in, and I’m a natural networker.

Sharon: Iris, first can you tell us—I’m always curious about this—how did you segue from practicing law to spearheading marketing and business development for law firms?

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Sharon: I should have also mentioned that you were President of IMLA, the International Municipal Lawyers Association.

Iris: Yes, as president of the IMLA, International Municipal Lawyers Association, in 2000, that’s when I connected with Bill and decided to split my time practicing and serving in that capacity. That took me around the country to various state league meetings and other conferences, including World Jurist Association conferences. I was able to work with Bill part-time as an instructor with WJF Institute, and as I continued to support that organization, I fell in love with what we were doing. We were teaching lawyers how to be much more, how to have a better bedside manner, how to be much more in tune with teamwork and that does have a positive impact on the attorney-client relationship.

Sharon: When you say you fell in love with it, was it the satisfaction you were getting from seeing lawyers...
blossom into rainmakers? What was it that made you think, “This is fabulous?”

**Iris:** I think it had a great deal to do with the fact that I realized that law firms were very entrenched in tradition in how we served clients. I fell in love with the aspect of—as the title of the training reflects—client relationships. That was really important to me, because that’s where it all begins and where it has to remain very high, and that’s in relationship building. Traditionally, lawyers would practice and really focus on the attorney-advisor and counseling role, more so than taking care of clients and building relationships, which is key and critical to any long-term relationship and sole relationship that we enjoy. Now that it’s much more competitive in the marketplace to practice law, you are competing with so many fine firms, so many fine lawyers, that it’s not good enough just to be a good practitioner; you have to have good relationship- and team-building skills. I really enjoyed that part because I’ve always understood that.

**Sharon:** I’m struck, because you talk about the fact that lawyers are very often advisors and counselors, but that doesn’t build the relationship. To me, if somebody is turning to somebody as an advisor, I would think, “Oh, they must have a really strong relationship.” What is it that lawyers have to do beyond that? What are you trying to instill in your lawyers?

**Iris:** That people want to work with those they like and those they trust. To be a good attorney, to be a good practitioner, to be able to go into the courtroom and win, that’s a good percentage of it. Results are very important, but you’re not going to even retain the client without a good bedside manner, without the ability to network and connect, and without the ability to build trust. It starts with rapport building, but trust comes later. It’s very, very difficult to acquire trust, but very easy to lose it. So, that’s what I mean.

**Sharon:** That’s very interesting. We’re going off some of the questions I said I would ask, but I’m just curious: let’s say you’re advising a lawyer who’s seasoned; they’re successful in many ways, but they want to do exactly what you’re talking about. They want to build better relationships. How do you counsel them to start, or how do you break through their own barriers?

**Iris:** Some lawyers have automatically figured this out and have wonderful skills in terms of working with people and listening. As attorneys, we tend to focus on the advising aspect, and that is important, but it’s very important to have excellent listening skills. The first thing I would remind them of is the 80/20 rule, asking questions 20 percent of the time and listening 80 percent of the time. As we get to know our clients better, everyone hears the mantra, “You must understand your client’s business.” In order to understand your client’s business, you have to understand your client. Sometimes people think, “Oh, if I look at Dun & Bradstreet or if I Google the client or read their annual report, I’m going to know everything I need to know.” You learn everything you need to know from what the client thinks their business is and what’s important to them, not just the theoretical aspect of learning about a client. I would say that an attorney needs to be open to listening more and speaking less and open to spending time with the client, because you can’t just go in and conduct an interrogatory-type interview with your client or take their deposition. You have to listen to them as people.

The way you even get an audience with your client is if they trust that you have something to help them with or you have a reason for being there in the first place. I know that law firms spend millions of dollars, in some cases, on marketing and courting their clients—money on socializing, money on dinners, events where clients are invited to attend—and that’s very important as well, but we need to make sure we’re developing authentic and lasting relationships. It’s great to invite someone to a dinner at an extravagant place, but the question is, are they there for you or are they there to enjoy the ambiance? Be genuine and sincere about the type of connections you’re making with your clients or your prospects, because they’re sophisticated. They understand the difference between authenticity and a marketing campaign or a marketing technique or tactic. So, I would say be as authentic as possible and find what the client enjoys. If someone enjoys a Yankees game, you’re not going to ask them to go to The Met. You really need to understand them and, once again, take the time to do that. Otherwise, it won’t be for real and clients are very savvy.

**Sharon:** That’s great advice. It’s so simple, so straightforward. Putting it into practice is where the challenge comes in, but it’s a great reminder. You joined the firm in 2015, but I know you were CMO or chief marketing officer at other law firms.

**Iris:** Yes.

**Sharon:** And we talked about the fact that, lately, there’s been a lot of movement in that position. People changing, musical marketers, let’s say. Why do you think there is that movement? It seems like years ago, chief marketing officers changed around because firms were getting used to “What do we do with this person?” Then, it seemed like they settled in for a while. Why do you think right now there’s more movement?

**Iris:** I think there are a couple of reasons for that. One, I think there is a disconnect between the client expectation and the deliverables from the CMO or the CBDMO. Expectations are not clearly explained or
delineated, and the deliverables aren’t meeting those expectations or exceeding those expectations. On both parts, there has to be excellent communication always, excellent communication between the law firm, the executives, the management, the chairs and the CMO or the department in general. We cannot continue as leaders to deliver the same old same old, which is a nice website, and usually you retain someone to give you a new website, so you just spend the money for that. We cannot simply be order takers. We can’t just say, “Oh, you want a new website? Oh, you want a new CRM system? Fine, I’ll pick up the phone and call a few people and get a great RFP response and deliver a recommendation to you. We’ll hire them and they’ll do the work.” We have to be innovators. We have to be creative. We have to be bold, and what I mean by that is not to dictate, but we need to be bold enough to recognize what the firm’s immediate needs are and, based on the desires of the firm, do their strategic planning. We need to be bold enough to make recommendations that are sound and well thought out, that we did our homework for, that we researched. A lot of my colleagues are incredibly talented, and I have a great deal of respect for my colleagues. Some haven’t picked up on the fact that law firms pay attention to their results more so than they think. I believe in accountability. So, I think the reason there is a flurry of movement is, number one, there isn’t a connection between the expectations and the deliverables, and number two, I think CMOs, CBDMOs are not feeling valued. What I mean by that is—and I make mention of this in my article in Strategies magazine, the May-June issue—

Sharon: Which was a great article, by the way.

Iris: Thank you very much. The article is about that: how do you retain that seat or how do you acquire that seat, and then how is your voice to be heard? You can always be in the room sitting, but are you going to be heard? It’s very important if you’re going to deliver accurately, according to the wishes of the firm. They have to include you in the conversation, and the conversation, of course, is something that should happen with your involvement, and I mean your active involvement. Active involvement means speaking up and speaking out. You’re supposed to be the leader. They entrust you with the role, the title, the function and the funds to deliver. Without the ability to know what they’re looking at and whether or not anything has changed, and if you’re not part of that conversation, you’re not going to get it. You’re going to get the memo way too late to be an excellent deliverer of services.

So, what I would say is that we’ve got to bridge the gap where there’s a disconnect between what firms say they want and what they actually get. We have to bridge that, and sometimes it’s that the firm doesn’t know or isn’t sure about that. A conversation needs to take place between the candidates before they go in, if that’s possible. I would never join a firm without knowing if they’re really sure they want someone of my caliber, someone with my talent, because I don’t want to waste my talent. No one really does. If a CMO does not feel valued, does not feel part of the conversation, does not feel they have the support—that’s another thing; you have to have the support, not just economic support through the budget, but support in terms of the proposals, the innovations, the initiatives, the projects. They have to be supported by management, because they’re not going to consider a serious initiative without management support. It starts at the top. So yes, there is a disconnect sometimes. I think when CMOs look on the other side of the fence, the grass looks a little greener, so they go to the next side. That’s a little bit frustrating for firms as well as CMOs, because folks love stability. I don’t know anybody who doesn’t love stability, both firms as well as the individuals serving in these high-level positions.

Sharon: Do you think a chief marketing officer, business development officer, who’s been in their position and has been more passive and more of an order taker, who’s chomping at the bit because they want to be more proactive, do you think they can change the situation? Can they change opinions, or do they have to leave and start over?

Iris: If they’ve been passive and they want to make it work—it’s like a relationship; it’s not going well; things look a little rocky. You don’t have to get divorced. There is an opportunity to salvage the relationship; however, their first step is to get some honest and candid feedback from management. If they have someone they consider to be a sponsor or a champion, they should start there and ask for advice about who else they should be talking with. Of course, it should be the top; it should be the chair; it should be the managing partner; it should be the management or executive committee members. They need to find out candidly what’s lacking and see if there can be a course correction. I’m a big believer in fixing whatever’s broken or having a solution for every problem. I believe that is always the case, but everybody has to be willing to participate in that solution. So, I would start with those folks and find out what have I not been able to do, what I have not been able to deliver on and then work on the solutions and expectations and, perhaps, the timeline, and see if it can be fixed.

Sometimes, Sharon, it’s merely lack of communication. If there’s a lack of communication—you thought they wanted X, but you delivered Y—all you need to know now is they’re looking for X or Z. Everybody gets on the same page and then works on a plan. Do not be afraid to plan. I’m a firm believer that, no matter how sophisticated you are, how much money you make, how big your title is, how large your firm is, there is always room to grow and develop and keep learning. We get entrenched in these ideas that, “Well, I did it at this firm very well. I did it at that firm very well. They liked my program. They liked my team efforts,” and you apply it to the
next firm, but one size certainly does not fit all. You have to be immersed in the culture of every firm you work in. You have to understand it, and don’t be afraid to ask, “What could I be doing differently?”

We survey our clients. We get feedback from clients, and we encourage our lawyers to do so on a regular basis so they can grow that relationship, keep it strong, and, of course, correct it when they’re not happy. Why are we not doing that with our own lawyers? We must survey our lawyers and our management committees to determine, “How am I doing?” and, “What could I be doing differently?” Also, to me, the biggest thing we could do, especially if things don’t look like they’re going well, is look at ways in which we could innovate and help the firm, but you’re not entrenched in it. If you’re not totally engaged—and, unfortunately, over 70 percent of our workforce is disengaged, and that’s very sad—but as chiefs and directors, we must be totally engaged and immersed in what our firm is doing. People can tell if you’re checked out and you have distractions and other interests and your heart’s not in it anymore. Then, I would say move on. For whatever reason, you owe it to yourself as well as to the firm to move. If you want it to work, there is an opportunity to salvage any relationship, but you have to be willing to make a change when change is needed.

Sharon: It’s great to hear you believe that things can be salvaged until they can’t be salvaged, when it’s a matter of, “O.K., let’s jump ship.”

Iris: Correct.

Sharon: In terms of engaging people, which is always a challenge, I know you’re a big believer in teamwork and that you really put that philosophy into play. Can you talk about why it’s so important? Who would you advise to think about teamwork? What should they be doing?

Iris: Certainly. There are various phases of teamwork and various areas where teamwork is absolutely critical. It’s not just with the departments within firms, the crucial departments that help to make the firm work well. That in and of itself is important for the functioning and operation of the firm. Also, the teamwork that is involved in collaborating amongst themselves, whether it’s a management committee or executive committee, and, of course, partners; they operate quite well as a team because they’re owners of the firm. However, when we look at teamwork for serving a client, we still—I believe it’s been a good 18 to 20 years since we started forming teams within firms, and folks still don’t think it works because we have to work at making it work. It is not easy. We have, for many reasons, allowed attorneys to own relationships as opposed to making it clear that it’s the firm that has the relationship. So, we have to work very hard at it, because clients are demanding it. Even if you don’t believe in it, in terms of external support for your clients and how to deliver that service, clients expect it. When we think about the benefits, as opposed to the detriment of not having teams, I think everyone would be very keen to do just that. If it’s a mandate and the clients expect it or if it’s going to help you be more competitive in the marketplace, then do it. I understand that clients are inclined to terminate a relationship with a firm that has solo representation or provides services in only one practice area. If you have more than three practice areas or groups that are serving that client, you’re less likely to be terminated because of it. We’re looking at convergence more than ever these days, and the relationship is deeper. Obviously, it’s more deeply rooted into the company or the entity, and it’s easier to serve them when you have more practices, but you cannot manage that without having an internal team within the firm; otherwise, it’s chaos. The right hand does not know what the left hand is doing. So, teamwork is essential on all levels for so many reasons.

Sharon: I agree that teamwork is important, but it seems to go against the grain of lawyers and law firms, in terms of every individual doing their own thing and one partner not talking to another. So, breaking down those barriers is quite a challenge. One of the things you said is that it will make them more competitive, and that probably goes a long way in getting people to listen. What else are you talking about in terms of changing this outlook?

Iris: I think it resonates because law firms are in business to be profitable; they always want the solution to what will make them more profitable. One super lawyer or one extraordinary person with an extraordinary relationship cannot serve that client in all of that client’s needs, and to let all of that other business and work go by the wayside, it’s beyond ridiculous. It doesn’t make good business sense to do that. So, if you want to look at it from a business standpoint, a business imperative that teams are absolutely essential, I think that’s one way of being persuasive and making that point to the attorneys.

I do think we would be remiss to not talk about the fact that what clients are asking for and demanding should always dictate the kinds of services and support we give them. We’ve heard so many times, in laymen’s terms, “The customer’s always right.” Whether they are or not, the customer’s always right. I think, in some cases, law firms are resistant to that. They want to be the attorney and counselor of law and it’s what the attorney says. That’s not the case anymore. The client rules. They rule when it comes to diversity. They rule when it comes to teamwork. They rule when it comes to wanting their legal service providers to have the ability to provide in more than one practice area. Quite frankly, we ought to be very attentive to that, and in many cases, we are not.
Sharon: That’s a very strong case for profitability. Client service is definitely changing in terms of who’s driving the ship. In terms of teamwork, I know you get them started early with your program, your Strategic Collaboration for Summer Associates, which won the LSSO award. Can you tell us about that? That sounds like such an interesting program, and it’s really instilling teamwork from day one.

Iris: Yes, Sharon, I’ll be happy to. First of all, having been a lawyer myself for many years before I got into marketing and business development as a career, it’s clear to me that the reason we have a little bit of a pushback or challenge in forming teams within law firms is that the compensation system does not accommodate team effort. It’s really difficult to tell lawyers that they should be making teamwork work and be formalized in the team compilation when they’re compensated based on individual achievement. I recognize that has been a very big challenge. Now, that doesn’t stop many, many successful firms, including ours, from forming teams and developing stronger relationships, deeper relationships, and greater diversity and practice area utilization than ever before. I believe the compensation system we are currently under does impede one’s ability to embrace teamwork in a universal manner. My belief is also that we’re dealing with tradition. Tradition is very hard to overcome. So, why don’t we start with the young people, who have a different way of approaching life, the practice, a different way of looking at diversity. Why don’t we start with them.

So, we started a summer associate program that actually speaks to this very thing and teaches these young folks a different way of doing things. In teaching them, they’ve passed on the lessons to the attorneys who cannot just hear about why it’s good for them to do X, Y or Z, but they actually learn kinesthetically and by doing. The summer associate program is intended to give the summer associate an opportunity to get their hands involved in a real-life opportunity to present to as many attorneys as possible after a four- to six-week program. The program this year—we just had the presentations yesterday—was five weeks in length. To be succinct, it takes the summer associate from an ISB questionnaire exercise, which helps them identify their own communication styles and learn the importance of understanding others when engaged in a presentation or dialogue, and how important it is to influence others through an appreciation for their communication styles. They went through that exercise. They completed the questionnaire, and I gave them a tutorial on how teamwork is impacted by communication and how to make a more powerful presentation through using and appreciating communication styles and techniques. Then, they’re introduced to teamwork and why teamwork is important. They are put into teams, and we have a discussion about how team dynamics will play a huge role in how powerful your presentation is. After that, they’re assigned a client target that is selected by our chairman, and they are given three weeks to prepare a PowerPoint presentation focusing specifically on how to successfully engage that client, which attorneys in the firm should be part of the capture or pursuit team, and the recommendations on how to acquire the business. We have our information center, our light law library; we prepare a research packet for them and that’s all we give them, just a basic research packet of 30 to 40 pages. That is all they get, and they do a wonderful job going ahead with their research. They can interview anyone they want. They can dive deeply into the business aspect of the company and then they present a 25-minute PowerPoint presentation with each member of the team.

In this case, it was five people making a presentation on a target, a real live target, to the attorneys. Yesterday, the audience was 60 lawyers in the room and 20 on the webinar. They don’t even have the opportunity, during their period here in the summer, to work with 60 lawyers, but 60 lawyers were able to observe these polished young people, who are still law students, present on competitive intelligence, business intelligence, relationship intelligence and tips and strategies on what to do next to acquire this business. This has been a fantastic program that I designed, and I want to say that it has been quite successful. Our attorneys not only have learned from our summer associates, but also our summer associates can go back—the presentation is also videotaped—to law school and say, “How did you spend your time with your assigned law firm?” “I can tell you that. Here’s what I learned.” Every single summer associate that has successfully completed this program with us has since joined our firm. So, it’s a two-way street. The lawyers get a chance to know more about them as individuals, and on the other hand, they get to understand and appreciate that our firm is deeply invested in them and is going to invest in their productivity and development, and that is really important. You can wine and dine a summer associate, then you bring them in and work them to death. That’s not going to retain them. I feel confident that this is also going to help with recruitment and retention. That’s not part of my bailiwick, but I tell you, I’ve seen the benefits of the program in and of itself communicating to summer associates that we really invest in them as individuals.

Sharon: What a concrete way to show it. I can see why it’s so strong, first creating these ties before they even start at the firm, and a great way to see people in action. You also mentioned that it’s brought in clients, that some of these have actually landed some of the prospects.

Iris: Yes, Remember, these are new or current targets they’re assigned to work on. They’re assigned to work on strategies for cross-servicing and developing stronger relationships and expanding the business that we have with current clients. They’re working on a real-life example, and they have done such a fantastic job that the attorneys take the information, polish it up with a little bit of their pizzazz, and utilize that information to pursue
the business, and we’ve been successful. Here’s the beauty of it: this is our fourth year, 2018. We have a number of summer associate who are now associates, and, in time, there’s an audience that now understands there’s a new way, a different way, a better way of collaborating on a client pursuit or expanding a client business. We’re not only teaching the audience, but we’re also training this new crop of attorneys who are coming in, and they’ll never, ever look at a prospect or an opportunity the same way. They will always do their homework. They will always dig deeply to find the little nuggets that will make the difference and give us differentiation over our competition.

There’s always going to be someone who will still do traditional marketing. “Who do I know? I’ll get in the door and tell them what a great law firm we are.” We now know that it’s so vital and important to think about the client’s needs and what our capabilities are, but we also must understand that not every pursuit that we want to undertake is in our best interest. It’s knowing who your competition is, understanding the relationships. We can learn so much from LinkedIn. We can learn so much from all different types of research. So, we don’t go after a relationship that is so entrenched and deep that we know we wouldn’t have an opportunity to penetrate that. So, we’re not only growing folks and helping them understand how important research is, but we also have people shifting their mindset about all of this, including our current lawyers. It’s not just the summers—think about how we’re changing a whole generation of attorneys by teaching through a demonstration of a different approach.

Sharon: It sounds fabulous, and what I’m thinking about is how this shows there are no quick fixes. This takes so much thought, strategy and patience. You have to do it year after year and you are growing another generation. A lot of times, we’re looking for that quick fix and it just isn’t there. Something like this, if you have patience and the fortitude, can really make a difference and give you that competitive advantage.

Iris: Absolutely, Sharon, you’re absolutely right. There is no magic bullet. We talked earlier about CMOs and the value they bring to the table, and sometimes people don’t realize or recognize what we actually can do. The other level of frustration or disconnect between management and the CMOs and the CBDMOs is, “Hey, you’ve been here two years. What have you done? You haven’t brought in several million dollars. You haven’t generated more revenue.” There is no magic bullet. It requires everyone to be all in, and that’s why I share with my colleagues that we have to be prepared and we have to always, always do our homework and stay ahead of the game. We’re always looking around the corner for our attorneys because we are the marketers; we are the business developers, and we need to remember that. We need to bring the innovation and the new ideas to the table, but we have to be at the table.

I’m very, very keen about this program, because you’re absolutely right: it does take time. Just think: Why do we have the audience? Why are we not just training the summers and letting them present to each other or to my department or to the directors in the department? Because it is a methodology to teach the audience, and now I’m proud to say we have a couple of our practice groups who have taken on the initiative of doing exactly what the summer associate program does. They put teams together. We call them pursuit teams when it’s a new target, and we call them cross-servicing teams when they’re looking to expand a relationship. I’m proud to say we have a few of them that are already experiencing going from two practice areas of service to 11 and 12 in less than three years. By the way, we track that. We monitor it and we measure it and we do it accurately, because it’s one thing to talk about success, but if you’re not documenting it and you’re not tracking the data and you’re not analyzing and reporting it, it didn’t happen. So, we’re very proud to say we have actually measured the results and we’re very, very happy about it.

Sharon: I give you a lot of credit. I give your firm a lot of credit for being willing to go with it and keep at it. It’s fighting the resistance of, “We’ve always done it this way.”

Iris: I’ve got to tell you, Sharon, if I may interject.

Sharon: Please.

Iris: The firm does deserve a lot of credit because my experience has been—I’ve worked for some wonderful firms and nothing against anyone. My attraction to McNees and my experience at McNees is that they’re so open to innovation and new ideas. We’ve been in existence for 83 years, and the firm has always been on the cutting edge of niche practices—for example, we just launched the e-sports practice group less than 30 days ago. We’re always looking at ways in which we can grow not only our firm, our practices, but also to innovate and not stagnate. It’s really quite a joy to work for a firm that is open to new ideas.

Sharon: It sounds like a good match between you and the firm. I feel like I could keep going and ask you questions for the next few hours, but I know you have a lot on your desk, and we’re out of time, unfortunately. I hope you can come back and we can continue the conversation.

Iris: That would be my pleasure, Sharon, thank you.
Sharon: We’d love to do it. This wraps up another episode of the Law Firm Marketing Catalyst. We’ll be back next time with another thought-provoking guest who can help you move your firm forward. Thanks very much for listening.

END OF AUDIO

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