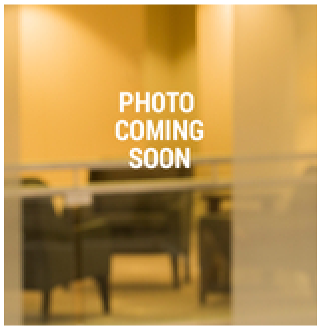
February 7, 2024 - Kathy King

'Tis the Law Firm Survey Season

For law firm public relations professionals, the first quarter of the year is often the most hectic. Not only is that when many firms announce partner and counsel promotions, but it's also when lawyers seeking greener pastures arrive as laterals from other firms or the government. In addition to strategizing for and launching the media campaigns for these announcements, legal PR pros are faced with the most time-consuming projects of all: the financial and headcount surveys conducted by various legal publications.

Each year, these opportunities seem to multiply, and the surveys expand in length. Making the process worse, the data sought by the various media outlets is not uniform. Some seek global numbers, while others seek U.S. or regional information. Some request census headcounts, while others seek full-time equivalents (FTEs). Even among the surveys seeking FTEs, the calculations can differ. The vast amount of information being sought is enough to instill a sense of dread. But rather than bemoan the season, approach it as an opportunity to showcase the great work your firm, its practice groups and its lawyers have done over the previous year.



Kathy King
Senior Vice President
Public Relations
202.415.1024
kking@jaffepr.com

Even if your firm didn't have its best year financially, there still should be positive stories to share. Did your firm invest in expensive technology that will prove to be cost-effective in the long run? Did your firm make strategic business decisions to focus on specific practices or regions that resulted in trimming practices and lawyers that no longer align with that strategy? Was a decline in revenue a result of an unusual surge the previous year that stemmed from payment of a contingency fee? Whatever the cause for the decline, don't shy away from approaching the survey and resulting media interviews as opportunities.

Get your law firm's survey responses in before the deadline

Ensuring that your law firm's story is presented accurately and positively requires a lot of preparation. The last thing you should do is procrastinate and wing it as the deadline nears, so when a survey arrives in your inbox, check the deadline for submissions. Even if the date is more than a month away, start preparing your firm's response as soon as possible. While some outlets will grant deadline extensions, rushing to submit your firm's responses at the last minute or submitting after the deadline can result in making mistakes and having inaccurate information being published. Plus, it can impose hardships on the editors and reporters at the media outlets who are working under their own deadlines. You certainly don't want to jeopardize your firm's relationship with them by making them get behind on their work.

After determining the deadline for submissions, go through the survey line by line and compare it with the previous year's survey. While many of the questions about financial results and lawyer headcounts may seem identical at first, a deeper dig into the survey might uncover revised definitions and data classifications, or new questions altogether. In recent years, editors and researchers have been expanding the list of questions in surveys to address a variety of internal firm decisions, such as remote work policies and office space expansion or reduction plans.

Once you have reviewed the survey, it's time to enlist the help of others at the firm who will provide the information for the various data fields. In farming out the sections to firm departments or designated respondents, make sure you relay any changes you have flagged in the section they will be handling. Provide the respondents with an internal deadline for completing their section – you'll need to build in padding between the internal deadline and the actual submission deadline to allow for any follow-up questions and your firm's internal review process.

Prepare well for media interviews

At this point, you may feel that your work is over for the time being – but that is far from true. While your colleagues are gathering the data, you should begin putting together a packet to help prepare your firm's leader(s) for the media interview they'll be participating in to discuss the firm's survey results.

Go through the press releases you've written and distributed over the previous year to pull a list of the major news you've promoted. This includes the arrivals of lateral partners, launch of new practice or industry groups, opening or closing of firm offices, promotion of partner and counsel classes, and significant pro bono and diversity-related news. Skip any media awards or legal directory rankings because reporters will not care about them.

Most importantly, pull together a variety of client matters that illustrate your firm's achievements over the previous year. This includes significant corporate deals, litigation victories, and regulatory and lobbying successes. As a best practice, check with the lead partner on each matter to make sure you still have the client's blessing to promote the success and that nothing has changed with the original result or the client/firm relationship. You certainly don't want to feature a litigation victory that has since been overturned on appeal, or a matter on which the client has since changed firms.

You will also need to gather any negative news that was covered by the media over the previous year, such as partner departures and/or lawsuits filed against the firm. While you hope that such news will not be dredged up for your leader's media interview, it's best to be prepared. Provide your leader with the approved firm statements that you previously prepared as part of your crisis communications planning.

Develop a prep packet

Once you receive the section data from your colleagues, you'll want to run a comparison with the previous year's results to note any significant increases or decreases in a particular category.

With the survey data and firm highlights in hand, you should be ready to develop two to three themes that best describe your firm's story for the past year. Whittle down the content you've gathered to curate the information that best supports these themes. For example, if your firm invested in a particular practice, you'll want to make sure that the lateral arrivals you feature in the packet were brought in to help build that practice.

Keep in mind that group arrivals tend to carry more impact than individual arrivals, unless the lawyer is a rainmaker. You'll also want to make sure to include a few notable client matters that illustrate the success your group achieved in the practice.

Keep the prep packet as simple and concise as possible, using bullets and other formatting to avoid a text-heavy document. While you don't want to overwhelm your leader with too much information, you do need to make sure they're familiar with the questions. Alert them of any new questions in the survey and your firm's responses, because those are often the topics reporters will focus on in their stories.

You may think that your firm leader already knows all this information. They do. But with everything they have on their mind at any given moment, you can't expect them to recall every lateral who joined the firm and every client success that occurred during the reporting period. The purpose of the prep packet is to compile and condense those highlights to support your firm's top themes from the previous year.

Finally, before your leader gets on the phone with a reporter to discuss the firm's results, make it a point to get on their calendar to discuss your firm's submission, and the themes and talking points you've identified and prepared. Ideally, the prep session should be conducted a day or two before the interview to provide enough time for any follow-up questions, but close enough for the information to be top of mind for your leader. Not only will this meeting help prepare your leader for their conversation with a reporter, it will also display the value you add to the firm as a media relations professional.

On the day of the interview, sit in on the conversation and quietly take notes. While most reporters will assume that the firm's communications lead is listening, your firm leader should acknowledge your presence. After the call, go through your notes and send a message to the reporter, providing them with the names of any lateral arrivals who were mentioned, as well as key information about any client matters that were discussed. The intent of this follow-up is not to provide the reporter with every talking point you shared with your leader, but to provide the spellings of names and important factual details to help the reporter with their story.

For many firm leaders, the financial reporting interview is the most important one they do all year; for some leaders, it is the *only* media interview of the year. That's why it's important to put in the time and preparation to achieve the best story and headline possible.

For more help with preparing your lawyers for law firm survey interviews, or any other public relations needs, reach out to me, Kathy King, at kking@jaffepr.com.