Why Customers Come and How to Bring Them Back

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Lynn P. Chard has been the Director of the Institute of Continuing Legal Education since July 1, 1993. She served as the Institute's Publications Director for thirteen years prior to becoming Director. A cum laude graduate of the University of Michigan Law School, Ms. Chard practiced law with the State Appellate Defender Office prior to joining the Institute of Continuing Legal Education (ICLE) in 1981.

As ICLE's Director, she has greatly expanded the continuing education opportunities for Michigan lawyers. . Under her direction, ICLE added technology training for lawyers, developed â€œcertificate of completionâ€ programs in probate and estate planning and in family law, created "boot camp" training for new law firm associates, increased the number of major annual Institutes and, most recently, expanded to offer a Change Leadership Network with related products. She has led ICLE in developing extensive online educational resources. These include an online library of 51 books, continually updated and linked to primary law, and an educational service that includes hundreds of web casts, seminar materials, "how-to" kits, forms, and "top tips in 10 minutes".

She is active in the Association for Continuing Legal Education Administrators (ACLEA) and has held many positions including Director-at-Large, Publications Committee Chair, and editor of the ACLEA Newsletter. Ms. Chard has served on the Advisory Board of the CLE Journal and on the Planning Committee for the CLE Summit. She is a member of the American Society of Association Executives. She is a member of the State Bar of Michigan and serves on its Membership Services Committee and its Annual Meeting Committee.

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Note to Attendees:

This session will be a **hands-on interactive education experience**. You will learn 5 simple steps to creating a CLE organization (or new set of products or services) that have a strategic advantage over the competition. You'll take this new approach back to your own CLE and be positioned to hit the ground running.

The session will start with a brief 10-minute lecture. Please prepare by reading these materials first. The lecture will only focus on the most important concepts for creating CLE organizations (or new products/services) with real strategic advantage.

Next, we will identify what types of new services you might want to create that will attract customers and keep them coming back—that will make you stand out from the competition. Examples might be: New Lawyer Training or Online Services, a Product Line of e-books, Enhanced Institutes, Blended Interactive CLE Seminars…..the choice is yours. Come with your ideas. We'll break up into groups with participants working on the Product or Service that interests them.

Next, you'll work with your group, using checklists distributed at the session, to create a winning product plan using these 5 simple steps.

1. Determine your Unique Business Proposition
2. Brand identity: identify your values and align your actions with them
3. Know your customer needs
4. Make an offer they can't refuse
5. Keep your customers coming back

Finally, we'll share the highlights of each group's product plan.

I. The Challenge to CLEs Today.

The key challenge facing most CLEs today is attracting, retaining and growing our customer base in light of new, free (or very low cost) competition. Internet-based education from private providers is often very low cost. In addition, "member-related" services, i.e. webcasts and online resources, are often incorporated into member dues. Short, live CLE events offered by member organizations are often extremely low cost, given membership subsidies. Changes in technology open up the educational field even more—Web 2.0 enables new interactivity in online education; mobile devices bring new value added features; 4G networks bring speed and reliability to connections; and new investment in the "tech-ed" field is likely to result in innovations.

This presentation is about how we can address that challenge. How can we attract customers and keep them coming back, despite new competition? How can we create new products and services or adjust our business models to gain a strategic advantage over our competitors?

II. The Basics: Understand the Principles that Drive Successful Businesses.

A. Business Strategy Matters.

In today's competitive CLE world, it's imperative to identify and pursue an effective business strategy to thrive. The best analysis of business strategy I have seen is a popular article by Michael E. Porter, "What is Strategy?" Harvard Business Review, November-December 1996. Despite its date, this article remains extremely relevant today. See www.ipocongress.ru/download/guide/article/what_is_strategy.pdf

Porter explains that it's nearly impossible to achieve a long-term competitive advantage based on operational effectiveness, i.e. performing similar activities better than your rivals do. Why? Because best practices, adoption of new technologies or improved customer service is easily copied by others. Therefore, it doesn't give you a real strategic advantage. Instead, the productivity frontier just keeps getting pushed farther out.

Porter contends that to achieve a sustainable competitive advantage, an organization needs to perform *different* activities from its rivals or perform similar activities in *different* ways. Business strategy "means deliberately choosing a different set of activities to deliver a unique mix of value." Porter, p.64. Porter uses Southwest Airline to illustrate an effective business strategy—Southwest tailors all its activities to deliver low cost, convenient service on a particular type of route, short hauls between midsize cities and secondary airports in big cities. Southwest chooses to perform activities differently or different activities from its rivals to deliver low cost and convenience on its chosen routes. It uses a standardized fleet of 757s and it does fast turnaround so that its fleet is in the air longer. It deliberately makes some trade-offs—it doesn't do some things, i.e. it doesn't offer meals, assign seats, or check interline baggage. Its unique set of activities gives it a cost and convenience advantage that a full service airline cannot duplicate.

Ikea is another example of an effective business strategy—its strategic position is to target young furniture buyers who want style at a low cost. As a result, Ikea performs a different set of activities or performs them differently from their rivals. Ikea uses a self-service model based on clear in-store displays; it designs its own low cost, ready to assemble, modular furniture; it displays every piece of furniture in room-like settings; and it has a huge warehouse next to the furniture displays so customers can do their own pick-up and delivery. Ikea also offers extended hours and in-store childcare to respond to the needs of its target customers. Again, Ikea does different activities or the same activities differently to provide stylish, low cost furniture to its target customers—this unique mix of activities results in high value that cannot be easily duplicated.

Our challenge in today's competitive CLE environment is to figure out how to serve our target audience with a different set of activities, or activities done differently, so that we deliver a high value to our target customers in a way that can't be easily duplicated by rivals. Taking such an approach almost always involves some trade-offs—we won't serve some customer segments in order to concentrate more effectively on our target segment; or we won't provide live attendance at our webcasts in order to gain the production values of a studio production. In today's rapidly changing environment, CLEs have the opportunity to consider and try new business strategies that take advantage of changes in business practices for lawyers, new technology such as social networking and mobile devices, and new trends in tech-ed. All these developments are both challenges and opportunities.

We need to understand our customers thoroughly; we need to target a particular set or sets of customers; and we need to deliver a unique mix of value if we want an effective business strategy. What are some examples of such an approach? One good example is Minnesota CLE's large Employment Law Institute, which draws nearly 1,000 participants by delivering content and effective networking for both employment lawyers and human resources personnel. Another example is ICLE's Partnership, which effectively combined our publishing expertise with live seminars and offered a package of blended CLE services just as the world was moving to the Internet.

Here's how ICLE developed its unique mix of value with its Partnership. We targeted solo and small firm lawyers. We knew they wanted convenient, up-to-date practice resources on Michigan law—they had no MCLE requirements so that wasn't a driver. They did like to attend seminars when getting started in an area or when a new law was passed. We combined practical print resources they wanted (drafted forms and "how-to" guides) with the seminars they were motivated to attend even without CLE requirements. We looked at the changes in the outside environment, i.e. the rise of the Internet, and decided to move these traditional services (print products and live seminars) into online services that were more convenient (or soon would be) for our customers. The customers did not ask for these new services—they didn't know they would want or need online services. It was our job to figure that out and build it for our customers. We did this year by year—relentlessly innovating and requiring new staff expertise to deliver our practical, up-to-date, trustworthy, competence-building resources for the convenience and benefit of our customers. No rivals come close to the unique mix of value we deliver to our customers and we have thrived in hard economic times.

We now have over 9,000 ICLE Partners in a state with about 18,000 private practitioners (40,000 members of the mandatory state bar). Prices range from $595 annually for solos to $7,000+ for firms of 100+. Over the years, we have added more and more online resources and have pulled back on live and video replay presentations. We are now adding an online interactive community and have a mobile view of all content. No one offers more up-to-date content—we continually update many of our online practice resources. We offer webcasts on new developments within a month or less of passage of a new law. We have very high Partnership renewal rates (85% for solos and 100% for firms of 10 or more).

B. Live and Breathe Your "Brand" and Your Values.

As you adjust your services to address today's challenging CLE environment, it's critical to re-examine and apply your values and brand to any new services or new approach. Your values and brand reflect who you are--what your customers think of your organization and its services.

Assuming you have excellent brand recognition, you don't want to lose that as you adjust your business strategy or try new services.

Core values and brand are intertwined. Brand is the name, term, design, or other features that distinguish your organization's services and products from those of others. Brand experience refers to all the thoughts and experiences a typical customer associates with your organization and its products and services. Brand experience is a direct reflection of your organization's core values. The better you align your actions with your values, the better your brand recognition.

But, you may wonder how to arrive at your organizational values in the first place. Collins indicates you don't set them; you "discover" them. One method is to identify the 5-7 people in your organization who have the highest level of credibility with their peers and demonstrate the highest levels of competence. What values do they reflect? Values are timeless; they are core and should never change. If properly identified, they remain fixed. Other things about your organization—practices, policies, strategies, procedures—are open to change. But, your values and purpose remain fixed.

At ICLE, we used staff brainstorming and customer interviews to "discover" these core values: trustworthy, practical, partnership, innovation and competency.

Other sample values are: integrity, service, accuracy, individuality, collaboration, generosity, respect, courage, joy/fun, challenge, teamwork, excellence, volunteerism, flexibility, honesty, responsibility, efficiency, stewardship, friendliness. For more guidance on how to identify your core values, see Exhibit A.

For a very useful analysis of the importance of **aligning actions and values**, see this article by Jim Collins. http://www.jimcollins.com/article.topics/articles/aligning-action.html. ICLE recently developed an online community to add to the existing ICLE Partnership. In developing this new service, the most useful exercise we did was to systematically align it with our core values (trustworthy, practical, partnership, innovation and competency). The Collins' article was a very helpful guide.

Collins contends that the most visionary organizations concentrate on *aligning actions and values* rather than on crafting the perfect "vision statement." According to Collins, vision combines three basic elements: (1) an organization's fundamental reason to exist, beyond just making money, i.e. its mission; (2) its timeless, unchanging core values; and (3) huge, but ultimately achievable, goals for its own future. Of these, the most important is its core values. To be a truly visionary organization, it needs to create alignment between its values and actions. This reinforces its purpose and stimulates progress toward meeting its aspirations.

Collins uses the example of 3M, which had core values of sponsoring innovation, protecting the creative individual and solving problems in a way that made people's lives better. What set 3M apart was that management translated these values into action. 3M allows its scientists to spend 15 percent of their time on whatever interests them; it requires divisions to produce 30 percent of their income from new products introduced in the last 4 years; it has a venture capital fund to support new ventures; it grants awards for innovation, etc. In other words, it doesn't just have a values statement—it aligns policies and actions with its values. 3M doesn’t just get out of the way of innovation; it actively creates mechanisms to support innovation within the organization.

At ICLE, when we developed an interactive online community for the ICLE Partnership, we realized that the typical, unmonitored discussions found in listservs did not align with ICLE core values. We were known for reliable, trustworthy resources and education. Therefore, we took special care to develop our online community in a manner that would align with our core values. We made sure it was “trustworthy” and “practical”; that it reflected the concept of “partnership” within the legal community; and that it promoted “competence” within the legal profession. Our value of “innovation” was reflected in our incorporation of interactivity and community into a service that, up to this point, was one-way delivery of vetted, expert content and education.

Here’s how we aligned this new interactive service with our values, particularly the value of “trustworthy.” We set policies that required all participants to use their name, firm, and city in posted responses. All had to agree to our community guidelines re: courtesy, relevance and ethics in order to participate. We lined up community “champions” who helped set the stage for the community by posting practical legal questions and answers before the community opened. From day one, participants saw the type of practical, trustworthy exchanges we anticipated. These champions also committed to spending time in the community to help answer questions in their practice areas. We also incorporated monitoring the community discussions into the regular work (and job descriptions) of staff lawyers. They were responsible for assuring that questions in their practice area were answered within 48 hours, calling on our network of legal “experts” if necessary. In other words, we made sure that this new online community was not a free-for-all—instead, it provides practical legal advice, it is trustworthy and it draws on ICLE’s existing “partnerships” with legal experts. It aligns with our core values and our brand. Customer activity in the community has exceeded our expectations from day one.

III. What Makes Customers Come?

A. Understand Your Customers’ Needs and Respond in a Unique Way.

Effective businesses develop around a set of customers and their unique and changing needs. To get your customers to come to your seminars or buy your related services, you need to thoroughly understand their needs for ongoing professional education and related practice guides and tools. If you understand the challenges your customers face in serving their clients today, you will have the basic information you need to develop education and practice resources they will seek out.

In the past, you may have been successful by following tried and true methods—you met your jurisdiction’s CLE requirements; used successful practitioners as speakers; established strong partnerships; and drew on your recognized brand. In today’s rapidly changing and competitive CLE environment, that approach may not be enough. Today’s CLE customer needs to work harder to earn the same income. He or she competes for business in a crowded market place, contends with national or global providers and Internet-based law services, and faces constantly changing technology and business challenges. In addition, today’s CLE customer has a dizzying array of educational options for CLE credits. Therefore, your traditional approach to CLE services may not allow your organization to thrive today. If that's the situation you face, this is the time to step back and be sure you bring your customers value in a unique way or with a unique mix of services for today's environment.

Customer needs research should be part of your organization's DNA. It's quite possible to do affordable, effective market research without hiring expensive market research firms. At ICLE we use a wide array of tools and follow some simple protocols. Our practices don't meet the standards of professional market researchers, but they've been effective in giving us an accurate read on our customers' needs. Here are those we've found to be the most insightful:

1. Phone Interviews of "best customers." Ask your staff to generate a list of your 50 "best customers," i.e. those who spent the most with you in each of the last 2 years. Include name, age or years in practice, firm name and location, email address and phone number. Have your seminar planners/ product developers or other key staff members contact 10 people on this list. (Email first to invite them to share their ideas with you and suggest a time for a 15-20 minute call.) Use a list of questions that will let them explain their law practices, their practice needs and challenges, their typical sources for practice guidance and education; new issues that have come up in the last year; as well as their vision for what their own practice will be like in 5 years. If you are considering a new service, ask if they would have any need for such a service. *See Exhibit B for sample questions.*

2. Conduct an online survey to verify any hypothesis you form based on your best customer interviews. Use Survey Monkey or a similar online survey service to develop and compile surveys of your customers. This is amazingly quick and inexpensive even though we get only about a 10-15% response rate to online surveys and we used to achieve a 30% response rate with repeated mailed surveys. Nevertheless, the guidance is almost always helpful and the time and expense is very manageable.

   When conducting a survey, it's important to remember a few basic rules. First and foremost, don't ask a question unless the answer will affect your future actions. Always ask yourself…what am I going to do with this information? How will it change our prices, our seminars, our product line up, our policies, etc.? If the answer is…it won't, then don't ask the question. Also, don't ask questions for which you already know the answer, i.e. their years in practice, the size of their firm, their practice areas or gender. If your customer database already provides you with this information, use it. Finally, be sure your survey questions and optional responses are clear. First, use someone on staff who is an excellent, clear writer to draft the survey. Then, hold a focus group with about 6 staff members and ask them to take the draft survey. Discuss each question and the responses to see if any of the questions are ambiguous. You will also find out if users wanted to see different possible responses and if the response options were clear. You will be amazed at how much you can clarify your survey by using an internal focus group. See *Exhibit C for a Summary of LERN's Customer Survey Advice and Exhibit D for a Sample Small Firm CLE customer survey.*

3. Keep a well-organized file of your past customer survey results. This seems obvious but it's easy to underuse customer feedback by not making it easily accessible to all. At ICLE we have an online Customer Feedback Repository that is available to all staff members. It is organized by Focus Groups and Surveys and subdivided by types such as Seminars, Partnership, and Books and is further subdivided by years. We conduct a number of annual surveys for our large subscription services and it's easy to track the results of the satisfaction surveys for each major service, year by year. On the cover sheet for each set of survey results, indicate the date the survey was sent, the number of recipients, the number and percentage of responses, and a description of who received the survey, i.e. customers who spend $100+ in last 2 years, family law seminar attendees in the last 3 years, etc.

4. Compile a weekly log of customer calls to your organization. This log should indicate the type of call, problems customers report, praise customers provide, etc. It should also have an area showing the action your organization took to correct or respond to a customer problem or the resolution of a policy issue. It should have a place (and a timeline) for addressing any recurring customer problems. Finally, it should be widely circulated within your organization, i.e. all seminar planners, product developers, managers, marketing and customer experience staff. At your annual retreat, you might want to include a report on resolution of all recurring customer problems identified over the last year (or have a brainstorming session to address any outstanding issues). *See Exhibit E for a Template for a Weekly Customer Feedback Report and Exhibit F for a Template for a Monthly Customer Feedback Report.*

5. Develop various advisory boards and hold annual in-person meetings. These boards often are based on subject areas and consist of experienced, expert practitioners who are also contributors to your organization. The main value of these boards is to get a deep understanding of current law and practice in a particular field. Such boards often reflect the perspective of high-end, successful practitioners and have less to say about what practice is like for the average practitioner.

   To get at the needs of the average customer, create one or more customer advisory boards, for example, new lawyers, solo practitioners, or small firm lawyers. Select representatives who do business with your organization regularly and are typical of those in their customer group. Why turn to existing customers rather than non-customers? In general, it's most profitable to learn more about current customers and sell them more services, based on their needs, than to go after a non-customer. The best way to find new customers is to appeal to non-customers who are like the customers you already have. Keep a file with minutes of all advisory board meetings, including board member feedback and recommended actions.

These recommendations are particularly useful when planning the next year's lineup of seminars or products. *See Exhibits G and H for a Sample Subject Area Advisory Board Member Job Description and for a Sample Advisory Board Agenda.*

6. Conduct customer focus groups to get qualitative information about your customers. For instance, a focus group is appropriate when you want to understand what your customers are feeling and thinking. If you want insights into what particular words, slogans or approaches will appeal to them, then a focus group is a good approach. One of the best resources for teaching your staff how to conduct a focus group is *A Practical Guide for Applied Research* by Richard A. Krueger and Mary Anne Casey (2008). These techniques are very useful and productive, even if you can't follow the maxim that attendees should not know who is conducting the focus group. Simply follow the ground rules for facilitators in the book. Don't be defensive—i.e. make it safe for participants to criticize your organization. If you do this, you'll find you can get good results without the high expenses of a paid consultant. Also, the skills you develop for leading a focus group have strong application to advisory boards and other leadership meetings.

Make customer needs assessment part of the job description for your seminar planners and product developers. These are skills that every seminar planner and book or online developer should have.

Once you know what your customers need, then respond in a unique way to those needs. Create a seminar or a service that is not easily copied—instead, it should draw on a unique set of capabilities your organization has that matches with customer needs. For instance, if you offer pretrial skills training for new lawyers, you might want to use your partnership with a local trial court or federal court to make a unique offering. This unique offering might include an inside look at the processes and preferences of the partnering court or include introductions to the court and its staff. Or, you could combine an in-person skills training session with access to "just in time" 20-minute online modules on key aspects of taking a deposition or making a motion for discovery. These modules allow attendees to refresh their skills right before an important court date. Another unique "add on" might be online or in-person one-on-one coaching. Or, your skills training might combine substantive law with skills training—you might offer criminal discovery practice, taking depositions in employment cases, or pretrial skills for the divorce practitioner. The key is to offer unique value by doing different things or doing things differently— distinguish your services from the competition. Ability to earn MCLE requirements in an MCLE state will be one of many "benefits" but will not drive the offering.

Put systems in place to identify and respond to your customers' needs year in and year out. Never rest. Constantly monitor their needs and the environment in which they need to operate. As their needs and their working environment change, constantly adjust your offerings to match their changing needs and environment.

B. Make an Offer that Attracts the Target Customer—One They Can't Refuse.

Once you have a thorough understanding of the needs and characteristics of your target customers, you have what you need to build an offer that attracts them. Like a fisherman, you need to fish where your customers are located and use the bait they like.

As you develop and communicate your offer, ask these questions. What communication channels do your target customers use? Then, use those channels for your offer. What related organizations and relationships do your target customers value? Then, align with those individuals or entities, and tout the value of the relationship. Does your offer include the features that are important to your target audience, i.e. is it up to date and convenient? Does it include the interactions your customers want? Will it help them get ahead? Bring them more clients? Will it save them time or money? Will they fall behind the competition without your service? Does your service help them avoid malpractice? Has something changed in their work environment and your service helps them meet that new challenge? Are you the trusted source they want to rely on for tackling something new? Spell out the advantages of your offering….and the dangers of not taking your offer. If you've done your homework on customer needs, you will know what bait will make them bite.

Here's an example of an offer that matched customer needs and a business model that couldn't be easily duplicated by competitors—the ICLE Partnership. ICLE's biggest target customer groups are solos and small law firms (2-10 lawyers). Years ago when we began offering the ICLE Partnership its primary target was the solo or small firm lawyer. It was an annual pass to 40 annual full and half day seminars (live or video replayed) in core fields (business, civil litigation, family, real estate, probate and estate planning). It was priced the same as the price of 3 seminars, i.e. the average number our customers attended in our non-MCLE state. We sold about 500 of these Partnerships each year in the early 1990s.

As the Internet became popular, we expanded the Partnership to include online seminar materials and 2,000 drafted forms, in addition to the seminars. Customers quickly learned to love the convenience and breadth of the online content. We surveyed them annually re: satisfaction and what additional content they wanted. We responded to their requests. Our income from the Partnership grew from $400,000 to over $2.1 million annually. The content and service also grew over the years. We added access to Michigan court of appeals and supreme courts cases; "how-to" kits with step by step instructions and forms; live and on demand webcasts of the 40 seminars; Top Tips in Ten Minutes; we added criminal law and employment law coverage. We invested in improvements—to search and browse, to customer support and training; and a "mobile view" of thousands of pages of content. Most recently, we added the interactive online community.

The ICLE Partnership is a unique combination of services that is not easy to duplicate. It keeps us extremely close to our customers and their needs. We have not had any rivals try to offer something similar. On the contrary, the popularity of the ICLE Partnership has led some of our former competitors, i.e. Bar Sections, to join forces with us and include their seminars in the ICLE Partnership. This online subscription gives us clear communication channels to our most important customers. They get a weekly e-newsletter as part of their subscription which includes notices of related products they can purchase. Likewise, when customers use online Partnership resources, they see related ICLE products and advertising. Partners have no need to shop elsewhere for law resources. While customers tend to buy the Partnership for content in their practice area, they renew for the convenience of having one service that covers everything.

Other examples of strong offers or "offers that are too good to refuse" are ICLE's new lawyer offers. Although we may offer very low prices or free online services, the products or services always reflect ICLE's brand—high quality and high value. In recent years, we have offered our big Institutes, i.e. the Probate and Estate Planning Institute or the Family Law Institute, at $50 for the first 50 new lawyers who register. The typical full price for an Institute is $295. These offers usually sell out within a week or so and we see far more young lawyers at our major events. As we gain experience, we will monitor how many of those taking these offers become full paying Institute attendees in future years. We have also just begun to offer one year of free access to one of our most popular books—*Michigan Basic Practice Handbook*—to all new members of the State Bar of Michigan in their first year of practice. Response has been strong and we will monitor how this translates into later paying customers. Next year, we plan to offer a free 3-month trial period for our new Basic Partnership. In today's age of free Internet content, we are making free trial offers for online services so that new lawyers can experience the difference between ICLE's vetted online services and free, law-related content on the Internet. Minnesota CLE recently began to offer free web-based content to new lawyers in Minnesota—webcasts, checklists, materials, answers from experts to new lawyer questions. They offer practical content with high value to acquaint new lawyers with their brand and values.

C. Word of Mouth: Recommendations from Your Community and Customers

Lawyers have always relied on other lawyers for recommendations about what seminars to attend, which speakers to hear, which books to read, what technology to buy, and which computer consultant to use. We have all experienced the impact of a respected speaker recommending a book to his CLE audience. Audience members stream out of the room after the session to buy the recommended book. Lawyers rely on the recommendations of colleagues to make many buying decisions. Therefore, enlisting customers to attract more customers is one way to get customers to come. Put a good product in the hands of your loyal customers and they become your sales force.

With social media and online communities, word of mouth becomes even more powerful. Some CLEs are setting up Facebook pages specifically for large CLE Institutes as well as Facebook pages for their bar associations or CLE entities. This allows those who anticipate attending as well as those who attended in the past to make recommendations and discuss the value of the event and share their opinions with others. Typically, CLEs will want to encourage speakers in particular to share nuggets of valuable content on a

Facebook page. If this shared information is useful and on target with the content of the CLE event, it serves as a recommendation or endorsement for attending. Unlike typical advertising, the approach is to share content. This might consist of a brief practice tip or a brief video of a speaker that includes a useful tidbit or advice. Or, you might want to encourage and help start community discussion and opinions on one or more topics that will be covered by a CLE event. This, too, helps generate interest and recommendations.

Of course, participants at CLE events also can be encouraged to use Twitter and "tweet" about your CLE event both before and during the event itself. These could be short recommendations about a particular speaker or topic; it might be simply sharing that the person plans to attend and wants to get together with others. Social media offers all sorts of opportunities for expanding on the concept of colleague recommendations.

At ICLE, we put most of our effort into our private online community for ICLE Partners. Since we already have 9,000 attorneys who belong to ICLE's own online service (and they regularly login and use our resources in a password-protected area of our website), we set up our own community. We used Higher Logic (software as a service) to get the features and interactivity of a community in an area that is not open to the public. Our thought was that lawyers would be more comfortable asking questions and sharing their recommendations in a community that was limited to lawyers (and in this case, further limited to those who join ICLE's Partnership).

Response to date: Within 4 months of launch, we have had over 1,800 ICLE Partners log in, agree to terms of use, and participate in the Community. Most activity has been around questions that arise in practice with colleagues helping colleagues. When we share tips from an ICLE seminar and link to related resources on our website, we have gotten 40+ clicks on those resources within a few days of the post. When we had a seminar on iPads for Lawyers, we posted a comment in our community with a link to a blog that shared tips from the seminar. This blog got 200+ views. Now, we are offering a second iPad for Lawyers seminar and plan to use the community to generate interest and discussion as well as recommendations within our community of ICLE Partners. This is simply the new version of the old-fashioned practice of relying on colleagues for recommendations and guidance.

IV. Why Customers Come Back.

A. Make it easy for your customers to stay with you year after year.

Always, always, always, look for ways to catch the customers once and keep them returning again and again. Think annual subscriptions, automatic renewals, annual conferences that customers "must attend" year after year. Think about related products/ services that can be added to existing ones. You generally don't want to bother with services that can only be offered once, especially if you don't have related products to sell. While you might be successful with the single seminar or book, it rarely helps your bottom line if you can't get repeat or expanded business from the same customer. It simply costs too much to reel in customers for a single sale.

Plan your books, seminars or other services with repeat business in mind. A book needs to be constructed, from the beginning, with updating in mind. Books that cite plenty of cases and statutes require updating at regular intervals and sell well on automatic subscription. Seminars can be planned with features that will make customers want to return year after year—from favorite featured sessions and speakers to a relentless focus on "what's new" to credentials and credits. For online services, the key is to provide constant updating and focus on what's new to assure renewals.

For books with supplements or updates, you want to sell on the negative option—the buyer agrees to take the supplement or update when it is issued UNLESS they mark a box saying they do not want the update. Our experience was that without the negative option, we never sold a supplement to more than 50% of the owners of a book. With the negative option, at least 85% or more took the supplement and we had excellent payment rates. Of course, our books were also planned with supplements in mind; they cited plenty of cases and statutes and there was a real need for the updated material. For most books on state law, the market is limited and the competition is also limited. Therefore, prices should not simply cover costs but should reflect the "value delivered."

Repeat attendance at seminars increases when you offer a strong lineup of annual updates or Institutes. Typically, these should be offered during the same month year after year. Advertise next year's date at this year's seminar and urge attendees to mark their calendars now. Repeat messages to past seminar attendees about the next date and major features keep customers coming back. Of course, compelling topics and strong speakers are the biggest key to keeping customers coming back. Seminar pricing should be based on your market, your costs and the value delivered. You will find many low-cost offerings in any market. Little can be gained from a race to the bottom re: pricing unless you have aligned your entire business model to be the low-cost seminar provider in your state and have the volume and cost structure to support it.

B. Customer Service is Not an Option.

In today's world of online content and services, CLE organizations are offering not only seminars and books but also "services." At ICLE, our biggest income producers are large online "services." As a result, we have steadily increased our emphasis on customer service and technical support. We could not survive without top-notch customer service. ICLE always includes questions about level of satisfaction with customer service in our various annual product and service surveys.

Here are a few "musts" for excellent customer service. First, we have set a rule of "zero calls to voicemail" for customer calls during business hours. We have our phones set up to "roll" through a number of phones until the call is answered. Just because the first 2-3 staff numbers are busy, doesn't mean the customer gets a busy signal or goes to voice mail. The call continues to roll through numbers until a staff person is available. Our customer service representatives wear headsets so that they are available for calls even if they have walked away from their desks. We monitor and report on the number of voicemails—that number moved from over 20 a week to zero most weeks after we set the goal of no calls to voicemail. Most importantly, our representatives make our customers feel as if we know who they are when they call—they remember frequent callers, they have critical customer information on their computer screens when they talk with a customer and they have a great sense of the characteristics of our typical customer.

A second important lesson we have learned is that we need to share customer service information weekly. We hold a meeting every week for all customer support, marketing and tech support staff to share information about ICLE's latest promotional offers; the customer questions staff can expect this week; technical or printing problems that we are addressing; any new policy decisions on special offers or new services. These meetings are invaluable in having a fully informed staff that can help customers effectively.

Third, we empower the customer service staff to handle the customer's question or issue. They don't need to transfer the customer to another person or put the customer off; they have established guidelines and leeway for resolving the customer's problem. We also have special staff to handle particularly contentious or problematic customers.

Fourth, we have learned that our sales staff members also need to be trainers for our online services. They become familiar with all the features of our online services and demonstrate these services in a variety of settings—at our customers' offices, in training sessions during ICLE seminars, in the exhibit hall at ICLE Institutes, and over the phone to individual customers. We also find that our customer service staff now needs to be technically proficient and well-trained; otherwise, they simply can't serve our customers who are using computers and mobile devices to view our various services. As further assurance that we can answer the customers' technical questions re: our services, we have technical staff "on call" to back up the customer service staff when necessary. Going the extra mile is essential. When we say we will get back to you with an answer, we do.

Of course, customer service at live seminars has always been critical to repeat business. It says everything about our values and brand as educators. Try attending a competitor's seminar (or that of another ACLEA member) to see what you like, and don't like, about the customer experience. I found that attending a Minnesota CLE Institute was a great way to get ideas for how to make customers feel welcome and well treated. The same was true when I attended a LERN conference and an ASAE conference. These are great sources for ideas on helpful, and not so helpful, customer experiences.

After getting perspective from attending others' seminars, step back and take a fresh look at what your own customers' experience is at your seminars. You will want to be able to answer these questions positively. Do you make every attendee feel welcome? Is it easy to know where the sessions are located? Do your attendees have materials available in the format or on the device of their choice? Is the facility comfortable? Can they hear the speaker clearly and see the PowerPoint or demonstration easily? Are the food and beverages in good supply and fresh? Does each attendee feel well-treated and that it's nice to be out of the office for the day? Are the faculty given special attention? Do they have everything they need both before and after their presentation? Do you see your staff being proactive taking initiative to greet customers? Do they bring special features or deals to the customers' attention?

In survey after survey, lawyers indicate they want very comfortable surroundings when they go out of the office for a seminar. A warm welcome, physical comfort, excellent food and an attractive setting are essential for customer satisfaction at seminars.

C. Give Your Customers More

As a general rule, you never want to produce a single product or service—you want an array of related products and services that will appeal to each of your major groups of customers. Each time you contact the customer, you want to have a number of offerings that match with his practice. You always need to achieve multiple sales to every customer to achieve long term financial success. You should not enter a subject area unless you have plans to develop at least 6-8 products, seminars or services that the targeted customer group will need.

Email and online communities make it very economical to keep in touch with your customers—to continually offer them more. As part of your seminar experience, you may want to include some pre-conference contact and access to online materials, case studies or exercises in advance of the seminar. You may use online communities to poll your customers in advance of a seminar about their questions and issues so that speakers can tailor their presentations to the audience. You can also use follow up discussions in online communities to expand on the issues presented at seminars or make selected speakers available for questions.

With ICLE's online Partnership, customers get daily digests of the online community discussions and blogs; they also receive weekly e-newsletters that provide new case summaries and highlight new content available in their ICLE Partnership. Our customers know we are continually available as "their partner in practice." We take every opportunity to remind them they have immediate access to thousands of ICLE resources to educate themselves and answer their practice questions. They frequently tell us "I turn to ICLE first." That, of course, is our goal.

Exhibit A

Excerpts from two articles on Core Values:

http://www.jimcollins.com/article_topics/articles/aligning-action.html

The following is a quote from the Jim Collins article:

"One way to identify your organization's authentic core values is to form what I call the Mars group. Imagine you've been asked to recreate the very best attributes of your organization on another planet, but you only have seats on the rocketship for five to seven people. Who would you send? They are the people who probably have a gut-level understanding of your core values, have the highest level of credibility with their peers, and demonstrate the highest levels of competence. I'll often ask a group of 50 or 60 people to nominate a Mars group of five to seven individuals. Invariably, they end up selecting a powerful, credible group that does a super job of articulating the core values precisely because they are exemplars of those values. One caveat: Top management has to be confident enough to trust the Mars group to do its work. In my experience, those executives willing to take this risk find that the group identifies organic values that the executive was tempted to impose from above. This experience in itself strengthens the manager's belief in the core nature of the values.

The Mars group should wrestle with certain basic questions: What core values do you bring to your work—values you hold to be so fundamental that you would hold them regardless of whether or not they are rewarded? How would you describe to your loved ones the core values you stand for in your work and that you hope they stand for in their working lives? If you awoke tomorrow morning with enough money to retire for the rest of your life, would you continue to hold on to these core values? And perhaps most important: can you envision these values being as valid 100 years from now as they are today? Would you want the organization to continue to hold these values, even if at some point one or more of them became a competitive disadvantage? If you were to start a new organization tomorrow in a different line of work, what core values would you build into the new organization regardless of its activities?

The last three questions are key because they help groups make a crucial distinction: core values are timeless and do not change, while practices and strategies should be changing all the time."

http://humanresources.about.com/cs/strategicplanning1/a/strategicplan_3.htm

The following information is quoted from the Ask.com article on Values and Strategic Framework by Susan Heathfield

"Your values are the core of what your organization is and what your organization cherishes. Values are traits or qualities that are considered worthwhile; they represent an individual's highest priorities and deeply held driving forces and beliefs. (Values are also known as core values and as governing values; they all refer to the same sentiment.)

Value statements are developed from your values and define how people want to behave with each other in the organization. Your value statements provide a measuring device against which you evaluate all of your actions and behaviors. Your value statements give words and meaning to the values that you decide to live by daily.

Value statements are declarations about how the organization will value customers, suppliers, and the internal community. Value statements describe actions that are the living enactment of the fundamental values held by most individuals within the organization.

The values of each of the individuals in your workplace, along with their experiences, upbringing, and so on, meld together to form your corporate culture. The values of your senior leaders are especially important in the development of your culture. These leaders have a lot of power in your organization to set the course and establish the quality of the environment for people. Your leaders have selected employees who they believe have congruent values and fit your workplace culture.

The Impact of Your Personal Values

If you think about your own life, your values form the cornerstones for all that you do, think, believe, and accomplish. Your personal values define where you spend your time, if you are truly living your values.

Each of you makes choices in life according to your most important four – ten values. Why not take the time to identify what is most important to you and to your organization? Identify and live your values. Manifest your values through value statements.

Why Identify and Establish Values?

Effective organizations identify and develop a clear, concise and shared meaning of values/beliefs, priorities, and direction so that every employee understands and can contribute. Once defined, values impact every aspect of your organization.

You must support and nurture the impact of these values and value statements or identifying values will have been a wasted exercise. Employees will feel fooled and misled unless they see the impact of the values and value statements within your organization.

Create Impact Through Values and Value Statements

If you want the values you identify and the value statements you craft to have an impact within your organization, the following must occur.

- Employees must demonstrate and model these values in action in their personal work behaviors, decision making, contribution, and interpersonal interaction.
- Organizational values help each person establish priorities in their daily work life. Priorities and actions must be grounded in the organization's values and model the value statements identified for each employee's job.
- Values guide every decision that is made once the organization has cooperatively created the values and the value statements.
- Rewards and recognition within the organization are structured to recognize those people whose work embodies the values and the value statements that the organization identified and embraced.
- Organizational goals are grounded in the identified values. Employees have identified how their goals and actions are congruent with and demonstrate the values daily.

- Adoption of the values and the behaviors that result is recognized in regular performance feedback.
- People hire and promote individuals whose outlook and actions are congruent with the organization's values.

Only the active participation of all members of the organization, plus the development of the systems and processes of the organization grounded in the company's values, will ensure a truly organization-wide, value-based, shared culture.

Sample Values

The following are examples of values: ambition, competency, individuality, equality, integrity, service, responsibility, accuracy, respect, dedication, diversity, improvement, enjoyment/fun, loyalty, credibility, honesty, innovativeness, teamwork, excellence, accountability, empowerment, quality, efficiency, dignity, collaboration, stewardship, empathy, accomplishment, courage, wisdom, independence, security, challenge, influence, learning, compassion, friendliness, discipline/order, generosity, persistence, optimism, dependability, flexibility.

Although important aspects of your life and deserving of your attention, these are not values: family, church, professionalism. If you define what you value about each of these, then you are identifying the core value. For example, the core value in family might be close relationships; in church, spirituality; and in professionalism, demonstrating integrity in everything you do.

Note: for an extensive list of “values”, see the attached full article from Ask.com

Exhibit B

[Customer name]
[firm and city]
Age: [if known, in practice X years]
Customer Interview: [date and who conducted]

1. What types of legal issues and cases do you handle? How long have you been in practice?

2. What changes have you seen in your **[family law or whatever subject area you are asking about]** practice over the last few years? What are the biggest challenges?

3. When you first started handling [practice area] cases, what were the biggest challenges? What did you have to learn? How did you learn it? What do you see newer lawyers struggling with?

4. In this area, what does ICLE do especially well? What could we do better? Add to our resources or training?

5. Do you attend any major in-person seminars or events (law or non-law)? Which? What motivates you to attend? [use this to draw them out about events we could offer]

6. In general, what are the most valuable networking opportunities you've found to grow your practice?

7. Do you have any certificates or credentials in addition to your law degree? Are you considering getting any? Do you have any suggestions for what ICLE could offer that would be valuable to you?

Exhibit C

Summary of LERN's Customer Survey Advice

1. Why survey? To collect data to help you make better product/seminar development, marketing and operations decisions

   Rule # 1: Don't ask a question unless you plan to use the answer to make a decision.

2. Who develops the survey and who do you survey? Product developers & seminar planners survey "best participants".

   Rule # 2: Survey your customers (participants), not your non customers. You want to understand what your customers want most, then develop products/services that respond to their needs. In general, we want to sell more to current customers and attract new customers who are like our existing customers.

3. How many questions and what type of question?

   Rule # 3: Keep your survey short and easy to answer. Try 1-3 questions. Use closed end questions such as yes/no, 1-5 range, or multiple choice.

4. What are the components of a survey?

   Rule # 4: Identify who you are addressing (book owner, course participant, etc.)
   Why & What you want to know
   Tell them how long it will take (be sure it's only a few minutes)
   Make it easy to select/give an answer
   Thank them
   Give the date by which you want a response

5. Make sure your questions and the answers are clear/ unambiguous.

   Rule # 5: Draft your survey and have a few people in the office take it. Ask them if anything was unclear. Did they want to respond with an option you didn't provide? Did they understand the questions? The answers? It's surprising how hard it is to be clear.

6. When should you survey?

   Rule # 6: For print surveys, avoid the holidays. For e-mail, best times are Tues. through Thurs. 10 a.m. to noon. For a "post person", ask the question at the first class, at the start. For the Web, survey consistently—place the survey question where user comes to expect it.

7. How often should you survey customers?

   Rule #6: Product developers should survey their customer groups between 6-12 times a year. This could include surveys handed out at seminars.

8. How many people need to be surveyed and how many responses do you need?

   Rule #7: LERN says you don't need to survey more than 400 people and that you need a minimum of 25 responses to see any trend or pattern. At ICLE we often survey up to a 1000 people and expect at least a 15% response rate and have gotten 30% or so with repeat requests but response seems lower in recent years.

9. What type of surveys can we do and what are the response rates & lag time?

   Print mail: Need to set up scanning answers. Response rate is 15-40% and takes one month to get responses.

   E-mail survey 1: Ask one question and allow people to answer by hitting reply and selecting up or down arrows to pick answer, then hit send. This gets a 15-40% response in 3 days.

   E-mail survey 2: Let recipient know you'd like them to answer a brief survey and provide a link to a survey on Survey Monkey. Often motivates people to promise to send them the results of the survey. Can expect a response rate of 10-30% within 3 days.

   Post person at a seminar: Course planner can ask question from the podium and get show of hands. Almost 100% Immediate response. Typical questions. How many practice in x area of the law? How did you hear about this course? Etc.

   Short survey handed out with course materials. Do **not** add these questions to the course evaluation (people in a hurry to leave; the questions are at the end.) High response rate if separate sheet with short questions is handed out. Planner should remind people to fill out survey and turn it in at any time during seminar.

   Web survey. Post a survey question on your web site. Run question for a month or less. Can expect less than 20% response rate.

   Phone survey. LERN couldn't give a response rate and time frame—said "it depends." Caller needs to be skilled in getting through to the lawyer.

   Recommended reading: How to Conduct Your own Survey by Priscilla Salant and Don.Dillaman.
   Survey Web sites: www.surveymonkey.com, www.questionpro.com, www.infopoll.com

2010 ICLE Customer Survey sm firm--final

Results Overview

Date: 10/19/2010 11:29 AM PST
Responses: Completes
Filter: No filter applied

Date Sent: 10/4/2010
No. Sent: 1,958
No. Completed: 83
Response Rate: 4%
E-Mail List: 2,000 small firm practitioners.

1. What kinds of matters do you handle frequently in your law practice? (Please pick the top 3.)

Divorce cases	28	34%
Advising closely held businesses	32	39%
Employment cases	15	18%
Consumer bankruptcy	10	12%
Drunk driving and traffic offenses	8	10%
Misdemeanor or felony criminal defense	9	11%
Medicaid planning	9	11%
Will and trust drafting	39	47%
Distressed real estate	12	14%
Personal injury cases	11	13%
Landlord-tenant matters	20	24%
Immigration	0	0%
Property tax appeals	7	8%
No-fault cases	8	10%
Intellectual property	1	1%
Other (please specify):	41	49%

2. In the next two years, do you plan to expand your practice in any of the following areas? (Select as many as apply.)

Mediation	18	38%
Consumer bankruptcy	7	15%
Criminal defense	3	6%

Clean energy		3	6%
Medicaid planning		24	50%
Divorce		9	19%
Immigration		2	4%
Veterans benefits		7	15%
Intellectual property		2	4%
Other (please specify):		17	35%

3. Do you take court appointments in any of the following types of matters? (Select as many as apply.)

Criminal defense		9	41%
Juvenile delinquency		1	5%
Child abuse and neglect		3	14%
Guardian ad litem appointments		10	45%
Other (please specify):		6	27%

4. If ICLE offered a seminar or online resources on the following topics, what is your level of interest in these topics?

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.	Very high	High	Moderate	Low/no interest
Asset protection planning	19 25%	28 37%	14 19%	14 19%
New health care law changes	12 16%	19 26%	22 30%	20 27%
Getting accredited to handle claims for veterans benefits	5 7%	6 8%	18 25%	43 60%
Representing families with special needs children	5 7%	14 19%	20 27%	34 47%
Creating an elder-friendly law office and law practice	16 22%	18 25%	15 21%	23 32%
Uncapping of property taxes	4 6%	23 32%	15 21%	30 42%
Foreclosure prevention	13 18%	16 22%	21 28%	24 32%
Advising Michigan nonprofits	6 9%	18 26%	17 24%	29 41%

Social Security disability claims	6 8%	11 15%	20 28%	34 48%
Chapter 13 Bankruptcy cases	7 10%	10 14%	11 16%	42 60%
Hands-on Medicaid planning	21 29%	14 19%	12 16%	26 36%
Business succession planning	21 29%	14 19%	21 29%	17 23%
Collateral consequences of criminal convictions	6 8%	7 10%	10 14%	48 68%
Oil and gas leases	4 6%	7 10%	10 14%	49 70%
LinkedIn, Twitter, and Facebook: what lawyers need to know	11 15%	22 29%	18 24%	24 32%

5. What skills would you most like to enhance or further develop related to your law practice? (Select the top 2.)

Pretrial litigation skills (drafting pleadings, handling discovery)	23	28%
Courtroom skills	26	32%
Contract drafting	15	18%
Oral presentation skills	13	16%
Negotiation	27	33%
Marketing/rainmaking	35	43%
Managing the business side of my law practice	26	32%
Using technology in my law practice	39	48%
Other, please specify	2	2%

6. How long have you been with your current law firm?

Less than 2 years	9	11%
2–5 years	11	13%
6–10 years	18	22%
More than 10 years	45	54%
Total	83	100%

7. How do you prefer to learn about ICLE's products and services? (Select the top 2.)

ICLE's printed catalogs and brochures		43	52%
E-mails and e-newsletters from ICLE		76	92%
Search the "store" area of the ICLE Web site		11	13%
Have my support staff screen ICLE's marketing pieces for me		0	0%
Other (please specify):		1	1%

Thank you very much for your help!

2010 ICLE Customer Survey sm firm--final

Results Overview

Date: 10/19/2010 11:30 AM PST
Responses: Completes
Filter: No filter applied

1. What kinds of matters do you handle frequently in your law practice? (Please pick the top 3.)

#	Response
1	med mal, probate
2	general real estate
3	collection
4	state and federal tax controversies
5	Property Insurance Claims
6	litigation
7	Custody, Paternity
8	Real Estate
9	Domestic Relations Mediation
10	Health Care Law
11	guardianship and conservatorships
12	Real estate matters
13	Probate and Trust Administration
14	paternity,custody, child support, uccjea,
15	Commerical litigation
16	prosecution and child protection cases
17	general business and civil litigation
18	Collection
19	Intellectual Property
20	business start ups and tax matters
21	Probate and Trust Administration
22	Real estate development, will and trust administration
23	Real property general litigation
24	municipal issues
25	Collection issues
26	Estate Administration
27	liability defense
28	I run a nonprofit and do not litigate
29	Real estate litigation
30	construction issues
31	Custody & Parenting time, Grandparent visitation, Adoption,Change of Domicile
32	Mortgage Foreclosures/ Workouts
33	municipal representation
34	Probate and real estate

35	Social Security Disability
36	Probate Administration and Litigation
37	Civil rights
38	business and tax litigation
39	Prosecute misdemeanors and civil infractions
40	Probate and Trust Administration, Buying and selling real property
41	adoption, real estate

2010 ICLE Customer Survey sm firm--final

Results Overview

Date: 10/19/2010 11:30 AM PST
Responses: Completes
Filter: No filter applied

2. In the next two years, do you plan to expand your practice in any of the following areas? (Select as many as apply.)

#	Response
1	not at the present moment
2	Estate Planning
3	estate and trust planning and estate and trust administration
4	divorce only-mcr 3.216
5	lemon law
6	Water Law
7	Health care law
8	elder law
9	no
10	NO
11	Tax appeals
12	Child Abuse and Neglect
13	landlord/tenant
14	employment matters
15	Mortgage Foreclosures/Workouts
16	Disability
17	Arbitration of disision of personal property-divorce

2010 ICLE Customer Survey sm firm--final

Results Overview

Date: 10/19/2010 11:36 AM PST
Responses: Completes
Filter: No filter applied

3. Do you take court appointments in any of the following types of matters? (Select as many as apply.)	
#	**Response**
1	None
2	probate - mental health & developmental disability
3	from pro bono clinic
4	NO
5	mediator
6	Court Orders Mediation

2010 ICLE Customer Survey sm firm--final

Results Overview

Date: 10/19/2010 11:36 AM PST
Responses: Completes
Filter: No filter applied

5. What skills would you most like to enhance or further develop related to your law practice? (Select the top 2.)

#	Response
1	ethics
2	Legal Research and writing

2010 ICLE Customer Survey sm firm--final

Results Overview

Date: 10/19/2010 11:37 AM PST
Responses: Completes
Filter: No filter applied

7. How do you prefer to learn about ICLE's products and services? (Select the top 2.)	
#	**Response**
1	But please cut down on the number of mailings. One calendar is good. Maybe one for the year and then early in one month the calendar for the next month.

2010 ICLE Customer Survey sm firm--final

Results Overview

Date: 10/19/2010 11:38 AM PST
Responses: Completes
Filter: No filter applied

8. What is the one product or service from ICLE that would help you most in your law practice?

#	Response
1	computerized copies, online versions/access of publications; online access to frequent updates to current ICLE publications
2	Form discovery questions
3	Just one-c'mon guys, you're killin' me. Seriously, I can't limit it to one. More like hundreds--of publications, seminars, forms and articles on the website. I've said it before, and will again: ICLE is the only friend we've got out here. Thanks for helping to make my solo practice possible.
4	CE
5	Continuing Education
6	webcasts
7	Forms and how to kits
8	Refence text on professional companies (PLLC or corporate)
9	More forms online.
10	I find the Formbank very helpful and refer to it frequently.
11	Better index on the ICLE subscription website
12	Updated case law regarding property insurance matters
13	The practice books
14	Partnership form bank
15	Seminaars
16	ON line Seminar Material
17	ICLE Partnership
18	What helps me most is the Annual Probate and Estate Planning Seminar. Very thorough and helpful. Tied for first,probably, is the Partnership, which I consider to be an invaluable tool to my practice.
19	Continued addition of seminar forms being a part of the "Partnership" form bank.
20	Access to Handouts & printed materials from icle training events (if I cannot attend(
21	Books
22	advanced family law seminars
23	Partnership
24	printed materials and frequent updates of same
25	The on-line research tools currently in place
26	I particularly like the short seminar format (half day or less)
27	briefs, clauses,
28	your publications
29	Bankruptcy practice (7 & 13) aids.
30	enhanced on-line case/statutory search materials
31	I like the sample documents that typically come up in a general practice firm. Its too bad ICLE can't join resources with Westlaw or Lexis to offer cheaper research rates.

32	Medicaid practice material to compliment Doug Chalgian's Michigan Medicaid Handbook. Specifically, more Nursing Home material and more importantly, non-Nursing Home material (waiver program, etc.).
33	Training my staff.
34	Webinars and on-line books
35	Employer's Guide
36	Expanded research tools
37	seminars
38	reduced prices for books and seminars
39	Estate Administration Guidelines for Michigan
40	update seminars - e.g. no-fault update
41	Michigan Family Las
42	How to be organized. not just docketing but the flow of paper through the office. And becoming paperless
43	Family Law Practice book- already have it. We are partners so the how to kits are also very helpful.
44	Practice Manuals - Family Law and Estate Planning
45	how to kits
46	Trust and estate planning materials that are hotdocs ready
47	short seminars (1/2 day
48	I can't think of any at this time. I am satisfied with ICLE's services and products and do use them.
49	Seminars
50	I like the ability to watch seminars online, since we are located in West Michigan and cannot always get to Detroit for seminars
51	mechanics of medicaid tools, e.g., SBO Trusts; step by step guide to half a loaf technique; step by step guide to placing and removing home from trust to increase CSRA, etc,
52	Social Security Disability Handbook
53	Brief/Pleading Bank
54	Business guides
55	How-To Kits
56	The ability to research the Michigan Statutes Annotated (so I could see summaries of cases construing the statutes).
57	sample expert deposition transcripts
58	the Michigan Business Torts on line book and income tax controversies would be beneficial as a new area on line
59	The forms section
60	form bank
61	Improving research tools.
62	practice updates and checklists

Exhibit E

Customer Call Comments and Question Feedback Form

Week of

Which products were customers interested in this week?	
Were any products and or services asked for this week that ICLE does not offer?	
What feedback did you hear about our products this week? Times when a customer said "I wish ICLE did…" or it frustrates me when x product does…"	
What policy questions were you asked about or asked to clarify this week?	
What technical help did you provide this week?	
What training did you provide this week on our website? Please note the product and the issue. Include items like help you gave in making an online purchase?	
What complaints did you hear this week?	
What calls/requests/complaints did we hear from our large firms this week? (P11-P100+)	
What compliments did we hear this week? What did our customer say we are doing well?	
What did our customers seem confused about this week?	
What did you struggle with this week? Something you didn't know how to do? A report or a web component that didn't work? Any communication problems or hold-ups? A task that you were not certain how to do?	
What feedback are you hearing from customers regarding mobile apps and tablets?	
What feedback are you hearing from customers regarding the ICLE Community? Other:	

Exhibit F

Monthly Customer Feedback Report – *[list month and year]*

[Instructions--collect information throughout the month, including advisory board minutes, lawyers' notes of Section Council meetings, newspaper and journal articles, and other routine sources of new law and practice trends. Look at the weekly customer feedback report. Put together a draft report at core management time, and send to the lawyers, Stephanie Fowler, Yvette, and Karen. Report should consist of bulleted items and be no more than 1-2 pages. Ask for corrections and additions. If you get anything significant, send it out in final form.]

1. What **major legal developments <u>have occurred</u>**, with their effective dates? What are we offering, and who is responsible?

2. What **practice topics have customers requested** in significant numbers?

3. Any significant things our **partnering or related organizations** are doing? Are we partnering with anyone new?

4. What one request did you hear this month that you think ICLE should respond to?

5. What one problem or issue raised by customers seems most significant, and what have we done to respond?

6. Overall practice trends

Exhibit G

Your Role as an ICLE Advisory Board Member

ICLE Advisory Boards are organized by practice area and meet annually with ICLE staff attorneys to give advice about trends and user needs. Board members serve 3-year staggered terms, which may be renewed one time for a total of 6 years of service. We occasionally appoint members as senior advisers who may serve longer terms.

Advise on Products, Services & Curriculum

Each advisory board advises on ICLE's proposed educational programs and practice resources within its subject area. Each board's goal is to ensure that ICLE offers an exceptional array of seminars, publications and electronic services that match the current education and practice needs of lawyers in your field of practice. We ask for your feedback on the content and functionality of our current and proposed seminars, products and services. We seek your advice on the most effective instructional methods (lectures, discussions, demonstrations, interactive exercises, self-tests) and the best formats (live presentations, print, audio, video, web-based, mobile devices, and other electronic media).

What can you do between meetings?

Between meetings, we ask board members to monitor significant practice developments in your specialty on ICLE's behalf. We hope you will alert ICLE staff attorneys to new developments with important practice implications, or respond to questions from our staff attorneys. We ask that you help us identify new trends and new areas in your field of practice. Our goal is to ensure that ICLE's legal education and resources are always up-to-date.

Recommend Speakers and Authors

One of the board's important responsibilities is to recommend speakers and authors for ICLE programs, publications and electronic services. Proposed faculty should have substantive expertise (at least 5 years in practice) and demonstrated presentation skills (for speakers) and writing ability (for authors and speakers). In addition, ICLE is committed to ethnic, racial and gender diversity among speakers and authors. We also strive to recruit contributors from various regions of the state and from firms of all size, including solos and small firm practices.

Advise on Technology Use by Lawyers

Board members are one of our most important links to how law is practiced and how lawyers use technology in their practices. We need your input on the ease of use and functionality of our web-based and mobile services. We look to you for feedback on what technology you use in your practice and how your technology needs are changing.

Thank you! We appreciate your time and thoughtful advice.

Exhibit H

ICLE Criminal Law Advisory Board

Agenda

Friday, October 26, 2012

Noon – 2:00 p.m.

ICLE Building

1. Welcome and Introduction (10 minutes)

2. Current Trends in Criminal Law and Practice (30 minutes)
    - What types of matters/issues are you seeing more of in your practice? What is declining?
    - Are there any major legal changes we should respond to or prepare for?
    - Have smartphones, iPads, Kindles, etc. made their way into your practice? What information are you accessing with your mobile device and when?

3. ICLE Publications and Online Products (30 minutes)
    - ICLE Community- overview & helpful tips for logging in, posting questions & getting answers
    - Blogs: Would you like to be a "Guest Blogger"? Ideas for blog posts that would be helpful for any lawyer who handles criminal matters
    - ICLE Books: Suggestions for new titles or topics?
    - ICLE's How-to Kits: Ideas for new topics and presenters?
    - ICLE's Top Tips in Ten Minutes: Ideas for new topics and presenters?

4. ICLE Seminars (30 minutes)
    - New seminar format- Updates & hot topics: ideas for criminal law-related courses in this format?
    - What other new seminar ideas should we be considering?
    - Do you have an interest in practice management or technology seminars?
    - Should ICLE offer criminal seminars that span all practice levels basic, intermediate, and advanced?
    - We're working on products/services dedicated to new lawyers. What do you see them needing? What would help?
    - What seminars do you attend that are not ICLE seminars?