



# How Mid-Market Companies Select Outside Legal Counsel: A Comprehensive Guide

Mid-market companies (the typical clients of **Am Law 100-200** firms) follow a multi-faceted process when finding and selecting outside legal counsel. This guide breaks down the process from the **buyer's perspective**, through the **selection journey**, the **role of digital content**, and the ongoing **relationship dynamics**, and highlights where **marketing can influence** decision-making. Throughout, we incorporate research from general counsel surveys (e.g. ACC, BTI Consulting, ALM) to illuminate how these corporate legal buyers think and act.

## The Buyer's Perspective on Outside Counsel

### Decision-Makers in Selecting Outside Counsel

In most mid-market companies, the **General Counsel (GC)** or Chief Legal Officer is the primary decision-maker for hiring outside counsel. A survey of legal departments found that the legal team had the top input in choosing law firms 89% of the time, far above the CEO (54%) or CFO/finance director (36%) <sup>1</sup>. In other words, the GC and in-house legal leaders typically drive the selection, while business executives or finance may weigh in for high-stakes or budget-sensitive matters. Procurement departments can be involved (especially in larger organizations or for formal RFPs), but in mid-market companies the legal department usually holds the reins on outside counsel decisions.

### Triggers for Searching for New Counsel

Several situations can prompt a mid-market company to look for new outside counsel. One common trigger is when the company faces a **new legal need or jurisdiction** outside the expertise of their current firms – for example, an unusual regulatory issue or expansion into a new state/country may require specialized counsel. Another trigger is a **conflict of interest** that disqualifies the incumbent firm from a matter, forcing the client to seek alternate counsel. **Changes in leadership** can also spark a review: a new GC often reevaluates the panel of firms and may bring in preferred contacts or simply want to ensure the best fit. Finally, **dissatisfaction or cost pressure** is a major factor. If current firms underperform or become too expensive, GCs will shop around. Notably, nearly half (48%) of chief legal officers recently said they are looking to move work to lower-cost law firms, and 22% are considering alternative legal service providers, due to pressure to control costs <sup>2</sup>. In short, anything that disrupts the status quo – new problems, conflicts, new leadership, or rising dissatisfaction – can trigger a search for fresh outside counsel.

### Building and Managing Panels of Approved Firms

Mid-market companies often maintain a “**panel**” of **approved outside law firms** that understand the business and meet certain standards (for quality, cost, etc.). These panels are periodically reviewed and “**converged**” (i.e. consolidated) to a manageable number of firms. In practice, many companies rely on a core set of firms with whom they have **long-standing relationships** – in one survey about two-thirds of GCs

said they selected firms based on existing relationships <sup>3</sup>. About one-third use formal panel arrangements or preferred provider lists, and only around one in ten look to broader law firm networks for new hires <sup>3</sup>. Companies manage their panels by setting **guidelines and performance metrics**, and by regularly reviewing outside counsel performance (sometimes with scorecards or evaluations). Formal **panel reviews** might occur every few years, where firms are invited to re-pitch or where new firms can be added for specific expertise. The goal of panel management is to balance having trusted relationships with keeping competitive value. For routine matters, in-house teams often stick to panel firms, while specialized or **critical matters** might lead them to go outside the panel if none of the panel firms have the requisite expertise.

## What General Counsels Want from Their Law Firms

General counsels consistently say they want outside law firms to be more than legal technicians – they want **true partners and advisors**. Research by BTI Consulting finds that “*superior client service*” is the **leading driver** of law firm recommendations by GCs <sup>4</sup>. In fact, 70% of GCs who recommended a law firm to peers cited the firm’s outstanding client service (far more than those who cited lower cost, which was only 6%) <sup>4</sup>. Key elements of client service include understanding the client’s business and industry. About 40% of legal decision makers explicitly say that the ability of outside counsel to grasp *business context and risk* is a critical component of great service <sup>5</sup>.

General counsels also value outside attorneys who demonstrate **business acumen and strategic insight**, not just legal knowledge. In the ACC’s 2025 CLO survey, 59% of chief legal officers said they want their own in-house teams to develop greater business savvy – and “certainly that’s what they expect from their outside counsel as well” <sup>6</sup>. GCs want lawyers who can **speak the language of the business** and offer practical, actionable advice (e.g. “solutions that align with strategic initiatives,” not just legal theory <sup>7</sup> <sup>6</sup>).

Several surveys and interviews with GCs highlight recurring themes in what they seek from law firms:

- **Responsiveness and Communication:** Prompt, clear communication is repeatedly mentioned. GCs appreciate outside counsel who “decode the legalese” into plain English that executives can understand <sup>8</sup>, and who keep them informed without being chased. One unwritten “rule” of great outside counsel relationships is providing **forwardable updates** – emails a GC can send straight to their CEO with no translation needed <sup>8</sup>. Regular status reports and proactive check-ins are highly valued.
- **Alignment with Business Goals:** The best outside counsel act like *strategic business advisors*. GCs want lawyers who help solve business problems, not just spot legal issues <sup>9</sup> <sup>10</sup>. This means knowing the company’s risk tolerance, industry trends, and priorities. An outside lawyer who can triage a situation and find a path that balances legal risk with business objectives will stand out <sup>11</sup> <sup>12</sup>.
- **Predictability and Budget Sensitivity:** Corporate clients need outside counsel who are **cost-conscious** and transparent about fees. Mid-market GCs operate under budget constraints, so they value firms that offer cost-effective solutions (e.g. **boutique firms or alternative fee arrangements**) and that don’t surprise them with billing issues. They also want firms to stick to budgets or warn them early of deviations. As one GC guide noted, failure to meet budget or billing guidelines is a fast track to getting fired <sup>13</sup>. In short, *cost control and value for money* are top of

mind. (For example, 59% of GCs in one survey believed negotiating better rates with a boutique firm could yield cost savings <sup>14</sup>.)

- **Team Continuity and Succession:** Mid-market clients rely on personal relationships, so they care about the **individual lawyers** assigned and continuity. They want assurance that if their key partner leaves, the firm has a succession plan <sup>15</sup>. BTI recommends that GCs even ask for a “*continuity plan*” and meet backup attorneys for major matters <sup>15</sup>. This reflects the importance of individual attorney relationships (discussed more below).
- **Proactivity and Knowledge Sharing:** The ideal outside counsel doesn’t just wait for questions – they *anticipate needs*. GCs value lawyers who alert them to emerging legal risks (a “radar for red flags”) <sup>16</sup> and share comparative insights (e.g. how others in the industry handle a new regulation) <sup>17</sup>. Firms that bring new ideas for adding value – without simply cutting fees – make a strong impression <sup>18</sup>. For instance, GCs love when a firm volunteers suggestions to streamline a process or offers free training to the legal team as an extra benefit <sup>19</sup>. Such value-adds show commitment to the relationship.

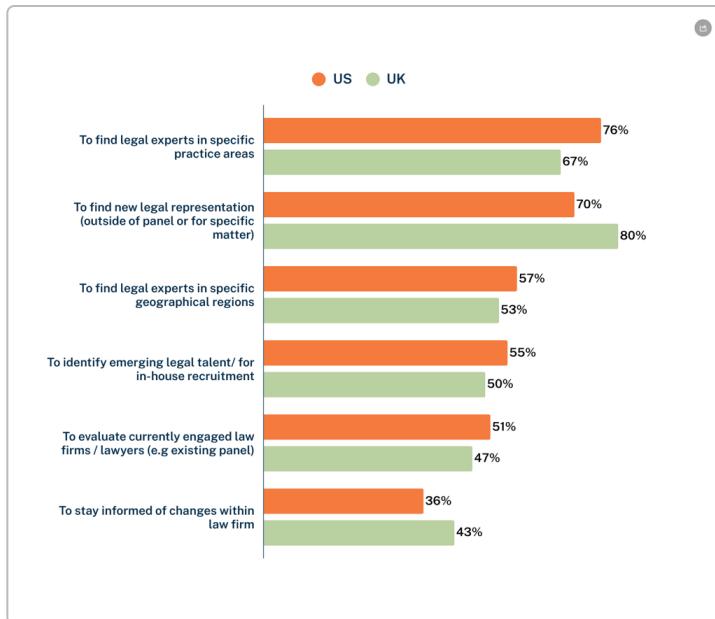
In summary, general counsels want outside counsel who make them **look good and make their lives easier**. As one expert put it, the outside lawyer should be a “*trusted advisor*” and *extension of the in-house team*, exhibiting business savvy, reliability, and a solutions-oriented mindset <sup>7</sup> <sup>9</sup>.

## The Selection Process: How Companies Find and Evaluate Law Firms

### Identifying Potential Law Firms (Referral vs. Research)

When a mid-market company needs to identify new outside counsel (whether due to a trigger event or to fill a specialty gap), **peer referrals** are the dominant source of candidates. In-house counsel overwhelmingly rely on **recommendations from their peers** to find law firms. According to BTI research, 86% of corporate counsel-client relationships began with an *unsolicited peer-to-peer recommendation* <sup>20</sup>. In other words, a general counsel hears a colleague at another company say, “Firm X did a great job on this issue,” and that firm gets invited to pitch. BTI calls this unprompted peer referral “*the #1 source of law firm growth*” <sup>20</sup>. Even in the mid-market, GCs are a tight community (often through ACC chapters or informal networks), and **word-of-mouth carries tremendous weight**.

However, referrals are not the only route. Companies will also do **independent research**, especially if they don’t have a strong referral or need to cast a wider net (for example, a niche practice or a new geography). Common research methods include: scanning **legal directories and rankings**, internet searches, reviewing industry publications for firms visible in a particular field, and leveraging professional networks like LinkedIn. Notably, **legal rankings** such as *Chambers & Partners* and *Legal 500* play a significant role as research tools. A recent 2026 study found that in-house counsel use rankings both to **discover and to validate** law firms: in the US, 76% of legal departments said they use legal rankings to find experts in specific practice areas, and 70% use them to find new firms for potential hire <sup>21</sup>. Over half also use rankings to check on or evaluate the firms they’re already working with <sup>22</sup>. (The UK figures were similar or higher – e.g. 80% of UK in-house counsel use rankings to source new firms <sup>23</sup>.) In essence, a directory listing or high ranking **puts a firm on the radar** when clients are researching options, and it provides a form of **third-party validation** of quality.



*In-house legal teams heavily use legal directories/rankings as a tool for sourcing and vetting outside counsel. In the US, 70–76% of surveyed legal decision-makers turn to rankings like Chambers to find lawyers or firms with the right expertise, and over half use rankings to validate their choices or review existing firms<sup>21</sup> <sup>22</sup>. This underscores that being visible in such rankings can significantly influence a firm's chances of being considered.*

Apart from rankings, **online presence** is increasingly important in the identification phase. If a GC hears of a firm (via referral or directory), their next step is often to “**Google**” the firm or attorney. They will look at the firm’s website, any articles or news hits, LinkedIn profiles, etc. **Mid-market companies do value a firm’s digital footprint:** one survey found that 8 in 10 in-house counsel consider a law firm’s website a valuable source of information when researching firms<sup>24</sup>. They may also read the firm’s published content or client alerts to gauge expertise (more on that in the next section). In summary, while a **personal recommendation** is often the spark, firms that want to be in the consideration set must ensure their **online and directory presence** backs it up – because savvy corporate clients will verify and supplement referrals with their own research.

## What Do Buyers Look for When Evaluating Firms Online?

When a GC or legal operations manager evaluates a potential firm (especially one they haven’t worked with before), they scrutinize several things online. First and foremost is the firm’s **expertise and experience relevant to the client’s needs**. Buyers will look at the practice descriptions and attorney biographies on the firm’s website: Do the lawyers have *industry experience* in my sector? Have they handled similar matters or dealt with the specific law or issue I’m facing? Case studies or representative matters can be very persuasive if they align with the client’s problem. If, say, a mid-market manufacturing company is facing an environmental compliance issue, seeing that a firm has a practice group in Environmental Law and has helped similar manufacturers is a big plus.

Beyond confirming substantive expertise, buyers evaluate **credentials and credibility**. This is where things like rankings, awards, and client logos/testimonials (if publicly available) come in. Law firm websites often list recognitions (Chambers rankings, “Best Lawyers,” etc.) – while these alone won’t win the work, they

serve as *social proof* that others vouch for the firm's capabilities. In unfamiliar jurisdictions or niche fields, GCs especially rely on directories: over 60% of GCs said they use directories like Legal 500 to find or vet counsel in an unfamiliar market <sup>25</sup>. They may also search for any **thought leadership content** (articles, alerts, whitepapers) the firm has on the relevant topic as a measure of how plugged-in and knowledgeable the firm is.

Another major factor is **culture and values fit**, which clients are increasingly researching via firms' online presence. According to a Thomson Reuters survey on outside counsel selection, many GCs now consider a firm's **purpose, diversity, and technology** stance as part of their decision <sup>26</sup> <sup>27</sup>. For example, about 71% of in-house teams will *evaluate a law firm's diversity & inclusion efforts* during selection <sup>28</sup>. They might look for information on the firm's website about diversity statistics or initiatives. Similarly, firms' stated values or mission (if authentic) can matter – 74% of GCs say a firm's purpose and values will be considered in decision-making (and 25% even call it a mandatory factor) <sup>26</sup> <sup>29</sup>. **Use of technology** is another criterion: 72% of legal departments consider a firm's tech sophistication important <sup>30</sup>. As part of due diligence, a GC team might ask or find out if the firm uses modern tools (for efficiency, collaboration, e-billing, etc.), or how they handle things like data security. In the digital age, a firm that appears tech-forward and efficient can have an edge, whereas an outdated, hard-to-navigate website or lack of online presence could raise eyebrows. (In fact, an outdated website is sometimes perceived as a sign a firm is less "with it" – anecdotal evidence suggests some buyers equate poor web presence with lower quality, even if unfairly <sup>31</sup>.)

**LinkedIn and social media** also play a role. Individual attorneys' LinkedIn profiles are often checked to see their background (former firms, any common connections, posts or articles). The firm's LinkedIn page might show its content feed; GCs notice if a firm is regularly publishing relevant insights. According to the 2025 Greentarget survey, **LinkedIn is by far the most valued social network** for professional content – 66% of decision-makers find LinkedIn valuable, more than double any other social platform <sup>32</sup>. Buyers may not put much stock in Twitter/X or Facebook for law firm info, but LinkedIn has become a place to gauge a lawyer's professional footprint and thought leadership.

In summary, when evaluating a law firm online, corporate buyers will look at: - **Expertise Fit**: practice areas, lawyer bios, case experience relevant to their needs. - **Reputation Markers**: rankings, client lists, testimonials, media mentions (to see if the firm is respected and trusted by others). - **Thought Leadership**: the firm's articles, alerts, blog posts, and whether those demonstrate insight on the client's issues. - **Team Profiles**: who exactly would work on the matter (often GCs will zero in on the specific partner's bio). - **Values and Service Factors**: clues about firm culture (diversity, proactivity, etc.) and use of technology – anything that indicates the firm will align with the client's expectations on service delivery.

## The Role of RFPs and Formal Selection Processes

Especially for significant engagements or when adding firms to a panel, many mid-market companies use a **Request for Proposal (RFP)** or a beauty contest process to systematically evaluate firms. An RFP allows the client to compare firms on specific criteria in a **structured way**. The RFP typically asks about the firm's relevant experience, the proposed team, approach to the matter, estimated fees or alternative fee arrangements, and sometimes questions about innovation, diversity, or other value-adds. According to Thomson Reuters data, formal RFP use has been growing as legal departments seek more transparency and competition in selecting counsel <sup>33</sup>. That said, not every matter goes through an RFP – frequently, GCs skip formal proposals if a trusted referral or incumbent is available. RFPs are more common for **high-**

**spend, ongoing work** (like selecting firms for a panel refresh, or for a multi-year litigation or portfolio of cases).

In RFP or beauty contest scenarios, **multiple stakeholders** may get involved. Legal operations or procurement professionals might manage the process – for example, procurement might help with **scorekeeping and cost analysis** to ensure an apples-to-apples comparison<sup>34</sup>. The GC and relevant in-house lawyers will, of course, judge the substantive answers. Sometimes business executives sit in on pitch meetings to gauge the lawyers' business understanding.

**What do these buyers evaluate in an RFP/pitch?** Aside from the obvious (legal expertise and price), clients often have detailed scoring for things like:

- **Understanding of the Business/Industry:** Firms that demonstrate they “get” *the company’s industry and unique issues* score higher. GCs hate generic pitches; they prefer when outside counsel articulates how they would handle the matter *in context of the client’s business* <sup>9</sup> <sup>10</sup>.
- **Team and Chemistry:** The proposed lead partner and team are scrutinized. Buyers often insist on meeting the actual partners who will work on their matter, rather than a pure sales team <sup>35</sup>. Chemistry and communication style matter – a pitch is as much about “*do we trust and like these people?*” as it is about their resume. Individual lawyer reputation is crucial: in one study, GCs said the **individual lawyer’s reputation** was even more important in selection than the firm’s overall reputation (70% vs 55%) <sup>3</sup>.
- **Value and Cost Certainty:** Clients will compare hourly rates or fee caps, but also ask about **budget management**. They may request alternative fee proposals or volume discounts. Many RFPs also probe how the firm will ensure no surprises in billing (e.g. use of budgets, project management, regular reporting). Given that 67% of in-house teams plan to demand rate discounts and 52% plan to ask for alternative fee arrangements in the current environment <sup>36</sup>, a firm’s flexibility on pricing is a key factor.
- **Service and Innovation:** Some RFPs include questions like “Describe how you will provide superior client service” or “How do you use technology or innovative practices to deliver value?” <sup>37</sup> <sup>30</sup>. This is where things like a firm’s legal project management tools, client portals, use of AI for efficiency, or unique knowledge management can earn points. For example, a firm might highlight a proprietary AI contract review tool if the RFP is for high-volume contract work, showing they can be more efficient.
- **Diversity and ESG:** It’s increasingly common for clients to ask about the diversity of the team (and even require diverse staffing on matters). As noted, 71% of legal departments will evaluate a firm’s diversity efforts <sup>38</sup>. Similarly, some clients (especially larger or public companies) ask about a firm’s sustainability or social responsibility (e.g. *carbon footprint* was cited by 20-34% of GCs as a consideration <sup>39</sup>). While these may not be deal-breakers for mid-market companies yet, demonstrating alignment with the client’s values can give one firm a slight edge over another.

The RFP process often culminates in **“beauty contest” presentations** where finalist firms come in (virtually or in-person) to present their team and approach. GCs say they prefer a conversational, problem-solving discussion in these meetings rather than a canned sales pitch. A BTI Consulting tip to clients is to “*interview law firm partners instead of watching a pitch*” – i.e. ask the lawyers questions about how they’d handle the matter and see how they think <sup>35</sup>. This tactic shows the client how the lawyers perform in a real dialogue. Law firms that bring the lawyers who will do the work, rather than a parade of senior rainmakers, tend to fare better in these evaluations, because the client can assess the actual working relationship chemistry.

In summary, the selection process is a mix of **relationship and rigorous evaluation**. Referrals may get a firm in the door, but the firm still must pass the client’s evaluation of expertise, fit, value, and service mindset – whether informally or through a structured RFP comparison.

# The Role of Digital Content in the Buyer's Journey

## Do GCs and Legal Teams Consume Thought Leadership?

Yes – but with an important caveat: they consume **quality thought leadership** and ignore the rest. Corporate counsel are flooded with legal content (alerts, newsletters, webinars) from law firms, and they've become discerning about what they invest time in. Surveys indicate that in-house lawyers *do* read law firm publications that are relevant to their needs. In fact, content like articles and client alerts can influence hiring decisions in a secondary way: one industry report noted that after peer recommendations, the things that sway GCs are “**articles, speeches, credentialing, and demonstrating expertise on issues they care about.**”<sup>40</sup> In other words, thought leadership opens the door and builds credibility (even though it rarely directly closes a deal). If a GC has seen a particular lawyer frequently quoted in their industry press or read a useful blog post by a firm, that firm will have a leg up in trust when the GC needs outside counsel.

However, GCs are selective. A Greentarget/Zeughauser survey in 2025 found that the **#1 reason content fails to resonate with decision-makers is lack of relevance**<sup>41</sup>. Busy in-house counsel will tune out anything that doesn't speak to an issue they have or anticipate. On the flip side, if a law firm produces a genuinely insightful piece on a pressing issue (say, a new regulation or a trending risk in the client's industry), in-house lawyers will read it and even share it. Over a quarter (28%) of in-house counsel said they *appreciate good content from law firms (even firms they don't currently work with) and forward it to peers when appropriate*<sup>42</sup>. And more than half will at least give a quick read to content from unfamiliar firms if the topic looks relevant<sup>42</sup>. These stats show that thought leadership can be a foot in the door: it's a way for “challenger” firms to get noticed by clients who haven't worked with them<sup>43</sup>. In fact, 31% of GCs in one survey said they greatly value communications (like articles) from firms *introduced to them by friends or colleagues*<sup>44</sup> – again reinforcing that referral + good content is a powerful combination to displace incumbents.

So yes, corporate legal teams do consume thought leadership, but primarily *for insight and practical guidance*. During the COVID-19 pandemic, for example, GCs overwhelmingly wanted “substantive, actionable guidance” from their firms, not generic updates<sup>45</sup>. Firms that produced timely COVID-related business insights saw high engagement (69% of GCs wanted content on COVID's impact on the economy, and similarly 65% wanted non-COVID business/legal trend content)<sup>46</sup>. The bottom line is that if the content helps the GC **do their job better or informs a decision**, it gets read. If it's fluff or overly self-promotional, it gets ignored or even causes annoyance.

## What Content is Valuable vs. Ignored

Valuable content, according to GCs, has a few key characteristics: - **Actionable and Substantive:** As noted, GCs favor content that offers concrete analysis or recommendations. For incumbent firms, substantive legal or business information is most likely to prompt a response from the client<sup>45</sup>. For firms seeking to work with new clients, *actionable insights* are the best way to spark a conversation<sup>47</sup>. In contrast, high-level summaries of the law that don't tell the reader “*what do I need to do about it?*” are less appreciated. - **Relevant to Current Challenges:** Relevance is king. Content tailored to current issues the business faces (e.g. regulatory changes, industry disruptions, risk management tips) will stand out. In 2020, a Greentarget study emphasized sticking to substance and relevance, noting that over half of GCs will read communications from unfamiliar firms if it's pertinent, and a significant portion will even share it onward<sup>42</sup>. Conversely, content that misses the mark on relevance (no matter how well written) will be deleted. -

**Easy to Digest:** GCs prefer content that is concise, **scannable**, and free of legalese. One tip from a PR expert was that law firms need to ensure their client alerts use “*clear, straightforward business language*” and have a compelling design so the reader’s eye goes to the key points <sup>48</sup>. Long-winded memos filled with citations are likely to be skipped. - **Timely:** There is an appetite among in-house counsel for timely perspectives on *pressing issues*. If something major happens (a court decision, new law, crisis event), GCs appreciate when their firms quickly provide a POV on what it means for them. On the other hand, if a firm is late to the party on a topic or writing about a stale issue, it may not get attention. - **Unique Insight (Signal vs Noise):** Many GCs feel inundated by repetitive content. To get noticed, a piece needs some *novelty or unique point of view*. As Greentarget’s experts put it, law firms should focus on being the “signal” not the noise <sup>49</sup> <sup>50</sup>. For example, sharing original data (perhaps from a survey or proprietary research) or a strong point of view on a legal development can differentiate content.

Ignored content tends to be the inverse of the above. Promotional announcements (like a press release about how great the firm is, or bragging about awards) are largely ignored by clients – one commentator quipped that clients don’t really care about your Super Lawyers list in a newsletter <sup>51</sup>. Similarly, overly general client alerts that aren’t clearly tied to a client problem are often trashed or just skimmed. And any attempt at gimmicky engagement (e.g. virtual “cocktail hours” or generic webinars with no takeaway) can fall flat – during the pandemic, 51% of in-house lawyers said they had no interest in virtual social events with firms <sup>52</sup>. GCs are busy; they will give attention to content that respects their time and intelligence, and they’ll ignore anything that feels like marketing fluff without substance.

To summarize, the content that hits the mark is **useful, relevant, timely, and concise**. Content that is self-serving, irrelevant, or cumbersome is quickly bypassed. Law firms that consistently produce high-value thought leadership can build credibility with clients over time, whereas sending low-value content can actually hurt a firm’s reputation with a GC (they may come to associate the firm’s emails with a waste of time).

## The Influence of Legal Rankings and Directories

Legal rankings and directories (e.g. Chambers, Legal 500, regional “Best of” lists) act as a form of **social proof and research tool** in the selection process, as touched on earlier. Many GCs use these directories in two main ways: **searching for firms/lawyers** and **validating choices**. A Chambers & Partners study in 2026 revealed that in-house counsel embed rankings at multiple points of the hiring lifecycle <sup>53</sup>. For initial selection, rankings help identify who’s good in a given field (nothing beats Chambers for a quick shortlist of, say, the top IP litigators in Delaware). Notably, 70% of US legal departments said they use rankings when refreshing their law firm panel or sourcing a specialist <sup>54</sup>. And a full 76% use rankings to pinpoint top practitioners in a specific practice area <sup>54</sup>.

For **validation**, if a GC gets a referral for a firm they haven’t worked with, they often cross-check if that firm (or the particular lawyer) is ranked in the relevant domain. Seeing a strong Chambers ranking or multiple accolades can reassure the buyer that the recommendation has merit. Over half of in-house counsel in the US (51%) say they use rankings to evaluate their current firms or lawyers <sup>55</sup> – for example, if their go-to employment firm suddenly drops in the rankings, it might prompt a conversation or at least awareness. In the UK, 47% said they use rankings to validate existing relationships <sup>56</sup>. This shows that directories are not just for finding new counsel, but also for ongoing benchmarking (“Is my firm keeping up with the competition?”).

It's worth noting that **legal directories are particularly handy for unfamiliar territory**. If a mid-market company is expanding to a new country or state where they lack contacts, directories might be the first stop. The Chambers study noted that both US and UK counsel use rankings for finding geographic expertise (57% US; 53% UK) <sup>57</sup> <sup>58</sup>. So, for cross-border needs or new markets, these tools are invaluable.

From the client's perspective, rankings are *one data point among many*. No GC would hire a firm **just because** it's ranked highly, but many would feel more confident including a highly ranked firm in a pitch list. Rankings also serve as **internal justification**: a General Counsel reporting to a CEO or board might cite a firm's Tier 1 ranking to bolster the case for why they chose that firm (e.g. "We picked Firm X because they are top-ranked in cybersecurity law"). In this way, rankings reduce the perceived risk of a choice. As Chambers' report interpreted, GCs treat rankings as a **procurement tool to source, assess, and even justify decisions** about outside counsel <sup>59</sup>.

For law firms marketing to mid-market clients, this means that **participating in rankings and maintaining a positive presence in directories is worthwhile**. It's part of the broader picture of reputation. Clients may not mention it explicitly, but a good ranking is often a silent influencer in their decision process.

## The Law Firm Website's Role and Other Social Proof

The law firm website is often the **first impression** and a hub of information for potential clients. As noted, 80% of in-house counsel consider firm websites a valuable info source <sup>24</sup>. From a selection standpoint, the website should quickly communicate the firm's **capabilities and credibility**. Key elements like attorney bios, practice area descriptions, and client success stories or case results are crucial. Buyers will typically visit the website to do a few things: - **Learn about the team:** They click on the bio of the lawyer who was recommended or who reached out to them. A well-crafted bio that highlights relevant experience, industry knowledge, and perhaps publications can reinforce the lawyer's expertise. Conversely, a sparse or generic bio is a missed opportunity. - **Assess firm size and footprint:** Mid-market companies want to know if the firm is the right size for them – not too small to handle a big matter, but not so large that they'll be a tiny fish. The website's descriptions of offices, number of lawyers, and locations help here. - **See the focus areas:** Does the firm focus on the type of work needed? For example, if it's a litigation matter, does the firm emphasize its litigation practice and showcase trial successes? If it's a regulatory compliance issue, does the site show a dedicated group for that? - **Gather proof of quality:** Many firm sites have a news or insights section listing big wins, deal closures, or awards. Clients scan these for evidence of relevant wins (e.g. "won a major case for a client in the same industry") or general signals of excellence. Testimonials or case studies, if present and specific, can be powerful social proof. Even if not explicitly presented, seeing logos of representative clients or a deal tombstone gallery can indicate the firm's experience.

**Social proof and reputation factors** extend beyond the website. GCs may quietly solicit opinions from their network (beyond formal referrals) – for example, they might ask a colleague, "Have you worked with Firm Y? How were they?" This back-channel reputation check is crucial and often determines the final selection. Additionally, third-party publications – like an article in Law360 about a big case the firm won, or being quoted in the Wall Street Journal on a legal issue – also contribute to a firm's standing in the eyes of clients. Recall that 88% of corporate decision-makers value **traditional media** coverage as an information source (the highest in 7 years) <sup>60</sup>. So, a mid-market CEO or GC might actually give weight to seeing their potential law firm mentioned in reputable media or industry press. It adds to trustworthiness.

In today's context, **client reviews or ratings** are not as prevalent in B2B law (unlike consumers looking at Yelp or Google Reviews for lawyers). But there are feedback mechanisms like AdvanceLaw or legal marketplace platforms where GCs share performance data on firms. Some forward-looking GCs use these peer-driven performance databases (one example is AdvanceLaw's GC network where they share feedback to inform selection <sup>61</sup>). This is another form of social proof – essentially an informal “rating” from fellow in-house counsel.

To sum up, a law firm's **digital presence (website, thought leadership, social media)** combined with **external validations (rankings, media mentions, peer feedback)** constitutes the social proof that mid-market clients examine. Marketing can nurture these aspects (ensuring the website tells the right story, pushing out quality content, engaging in PR to highlight successes) so that when a GC is doing diligence on the firm, every touchpoint reinforces a positive, credible image.

## Relationship Dynamics: What Matters in Ongoing Outside Counsel Relationships

### Individual Attorney vs. Firm Brand: Which Matters More?

In the mid-market segment, **relationships are often personal**. General counsel frequently say, *“I hire the lawyer, not the law firm.”* Trust is built with individuals – a particular partner or team that knows the company – and that trust can outweigh the allure of a big firm name. This is reflected in surveys: 70% of GCs rated the **individual lawyer's reputation** as extremely important in selecting outside counsel, compared to 55% who cited the firm's overall brand reputation <sup>3</sup>. An excellent attorney working at a lesser-known firm can still win the business if the GC has confidence in that individual. Especially for specialized matters, GCs will follow a star lawyer rather than a firm logo.

That said, the **firm's brand is not irrelevant**. A strong firm brand can act as a safety net – it implies there are resources and depth behind the individual. In areas like high-stakes litigation or deals, a mid-market company's board might be more comfortable if a “brand-name” firm is involved, thinking it brings clout or credibility with counterparties. So the ideal scenario (from a client view) is both: a reputable firm *and* a trusted lead lawyer. But if forced to choose, many GCs indicate the specific attorney relationship carries more weight. This is why we see situations where if a key partner leaves Firm A for Firm B, the client often moves their work to Firm B to stay with that lawyer.

From the law firm's perspective, this means ensuring that multiple individuals connect with the client (to avoid over-reliance on one person) and that the **firm's service culture** supports its lawyers in delivering great client experiences. The firm brand can provide assurance of quality control, but it's the individual interactions – each phone call, each piece of advice – that truly forge the client's opinion.

### Evaluating Firms They Haven't Worked With Before

When a client considers a firm they haven't worked with previously, **risk mitigation** is on their mind. They will evaluate the new firm carefully on all the factors we discussed (expertise, referrals, online presence, RFP responses, etc.), but often they'll also do a **trial run** before fully committing. For example, a GC may start by hiring the new firm for a *small matter* or a discrete piece of work to see how they perform. This “pilot

project” approach lets the client experience the firm’s responsiveness, quality, and communication firsthand. If the firm impresses on the small job, they become a candidate for bigger jobs.

Another method is to invite the new firm to **present insights or training** to the legal team before any engagement. Some GCs might have a prospective firm come in to do a CLE seminar or a briefing on a relevant topic. This low-risk interaction allows the client to gauge the firm’s style and knowledge. It also allows the individuals to start building a rapport without a live matter at stake.

Moreover, clients will pay close attention to how the new firm handles the **pitch process** and follow-ups. Are they listening to the client’s needs? Do they seem genuinely interested in the business or just selling? A firm that customizes its approach and shows enthusiasm for the client’s industry makes a good impression on a prospective client.

External references can be pivotal here. A cautious GC may ask the firm for **references from similar clients** – essentially calling a peer GC at another company who has worked with the firm. These reference calls (or informal coffee chats facilitated by mutual connections) can make or break a new firm’s chance. A glowing reference (“We used them on a complex case and they were fantastic, on budget and proactive”) will greatly increase confidence, whereas any hint of a problem (“They were good lawyers but communication was spotty”) can sow doubt.

In essence, when evaluating an unknown firm, clients look for **proof points** to ensure they won’t regret the choice. Every interaction is scrutinized a bit more until trust is earned. This is why new firms must often **out-compete incumbents** on effort and value in the early stages – to overcome the incumbent’s advantage of familiarity.

## Why Clients Leave One Firm for Another

Corporate clients, including mid-market ones, can be surprisingly loyal to their law firms – until something pushes them away. Common reasons that cause a client to switch firms include:

- **Poor Service or Responsiveness:** If a firm becomes unresponsive, slow, or starts treating a mid-market client as second-tier, the client will seek alternatives. GCs often recount experiences where outside counsel were quick to respond to the CEO but lax in responding to lower-level in-house attorneys – that kind of two-tier service breeds resentment<sup>62</sup>. Not meeting deadlines or failing to keep the client updated are cardinal sins.
- **Failure to Meet Budget / Cost Issues:** Consistently exceeding estimates, surprise bills, or refusal to discuss cost-saving approaches will drive clients away. BTI research notes that clients are under pressure to control costs, so outside counsel who “claim expertise but then rack up fees” without results will be cut<sup>13</sup>. If a firm won’t engage in alternative fee arrangements or volume discounts while competitors will, the client may migrate to the more cost-flexible firm.
- **Lack of Expertise or Mistakes:** Sometimes a firm simply doesn’t perform well – maybe they showed weak capability in a purported specialty or even made a serious error. One GC cited firing a firm that had claimed to have strong expertise in an area but turned out to be shaky<sup>63</sup>. Companies won’t tolerate costly mistakes or having to redo work.

- **Turnover and Continuity Problems:** If a client's key contacts at a firm leave frequently (e.g. high churn of partners or associates on their team), the client loses confidence. They don't want to re-educate new lawyers every few months. A lack of succession planning can cause a client to say "enough" and move to a firm with a stable team.
- **Misalignment or Conflict in Strategy:** Sometimes it's not about service quality, but a **strategic disagreement** or values clash. If the outside counsel repeatedly gives advice that the GC feels is too conservative (or too aggressive) for the company's risk appetite, that tension can lead the GC to find lawyers more aligned with the company's approach <sup>64</sup>. Additionally, if a firm takes on a representation that the company views as conflicting with its interests or values (e.g. representing a competitor in a sensitive matter), the company might terminate the relationship.
- **General Counsel Change:** A very practical reason – if a new GC comes in, they often have their own preferred firms. It's common in the legal industry that a new general counsel will review all incumbent firms and possibly **rotate in firms they trust** from past experiences, phasing out some of the old guard. This isn't necessarily a poor reflection on the incumbent firms; it's just the new GC's comfort zone and strategy.

When a client does decide to leave a firm, it's often after giving chances or feedback. Many GCs will communicate issues to outside counsel to see if they improve (e.g. "Your bills have been unpredictable; please fix this"). Firms that heed the feedback can often save the relationship. But if the problems persist or the firm doesn't show willingness to adapt, the client relationship is at risk. As one legal consultant put it, clients want outside counsel who *ask for feedback* and continuously improve – those who don't may not realize a client is unhappy until the work just stops coming <sup>65</sup>. By then, it's too late.

## How "Sticky" Are Law Firm-Client Relationships?

Law firm relationships tend to be **sticky, but not unbreakable**. Many mid-market companies have worked with certain law firms for years or decades, developing a deep familiarity. This stickiness comes from the comfort of knowing the firm understands the business, as well as the inertia of "if it's not broken, why change?" Indeed, as noted earlier, about two-thirds of companies choose firms based on **long-standing relationships** <sup>66</sup> – a testament to incumbency advantage.

However, client loyalty has been tested in recent years. Some research shows a decline in automatic loyalty: for example, BTI found that only 35% of corporate counsel would *recommend their primary law firm* to a peer, down from almost 70% a few years prior (an indicator of eroding satisfaction) <sup>20</sup>. Also, economic pressures are making clients less hesitant to move work if it will save money or get better value. Recall that 48% of CLOs are considering shifting work to cheaper firms <sup>2</sup>, which means nearly half of clients are open to switching providers for cost reasons alone.

We can say relationships are sticky in that **incumbents usually get the first call** – they often have the inside track on new matters. But that stickiness has limits. A misstep by the incumbent (like a big fee blowout or a high-profile loss) can loosen the glue quickly. Also, as legal needs evolve (e.g. needing new expertise), clients will venture beyond existing firms.

One dynamic that illustrates stickiness is that GCs often consolidate work with fewer firms (the "convergence" trend) to deepen those relationships. But if a converged firm disappoints, it stands out even

more, and the client might make a change at the next panel review. The cost of switching firms (time to onboard, bringing new lawyers up to speed) is a consideration that makes relationships relatively sticky – clients don't change outside counsel on a whim because it can be inefficient. Yet, when benefits outweigh costs (better expertise, service, or pricing), clients will switch.

In summary, mid-market law firm relationships are **loyal by default**, but this loyalty is increasingly **conditional**. The firms must continue to earn it through excellent service and value. The adage "it's harder to get a new client than to keep an old one" holds true, but from the client side we might say "it's easier to stay with a known firm than to onboard a new one – unless the known firm stops meeting our needs."

## Opportunities for Marketing to Make a Difference

Given the above insights into the buyer's journey, there are clear points where effective **marketing and business development** efforts can positively influence the outcome. "Marketing" in this context isn't about ads or gimmicks; it's about how a law firm communicates its value and engages with potential clients at each stage of their decision process.

### Influence Points in the Buyer Journey

**Awareness Stage:** Marketing can raise awareness of the firm among target clients before a legal need even arises. This includes maintaining a strong presence in **rankings, industry publications, and at conferences**. For mid-market GCs who are busy, seeing a firm's name come up consistently (in a Chambers ranking, on a panel webinar, or in an ACC article) plants a seed that *this firm is a player in X area*. When the need hits and they ask peers for referrals, those seeds can translate into your firm being mentioned. Thought leadership content (if truly insightful) essentially serves as marketing here – as GCs consume it, it builds name recognition and credibility. **Social media (especially LinkedIn)** can be leveraged by individual lawyers sharing useful updates, which might get in front of in-house counsel and make a positive impression over time.

**Consideration Stage:** Once a client is actively considering firms, marketing materials can make a big difference in how the firm is perceived. A well-crafted **website and proposal** are key. Ensuring the website showcases relevant experience (through case studies, bio details, etc.) is a marketing function – it aligns what you present with what clients look for. During RFPs, the ability to tell a compelling story in the written proposal and in pitch meetings is crucial. This is where marketing and BD teams often coach lawyers on messaging, highlighting differentiators, and even designing visually appealing pitch decks. The consistency of the firm's narrative (e.g. "we're business-minded problem solvers with deep expertise in your industry") across all touchpoints can reinforce the client's confidence. Additionally, *client references* can be facilitated by marketing – having a roster of happy clients willing to speak on your behalf is gold, and coordinating those references or case examples is a behind-the-scenes marketing job.

**Decision Stage:** At final decision, often the remaining differentiator is **personal chemistry and trust**. While that is largely the lawyers' responsibility to build, marketing can still support by providing **additional reassurance**. For instance, if during selection a GC is wavering, sending a tailored follow-up – maybe a memo of additional thoughts on their issue, or an invite to speak with another client of similar profile – can tip the scales. Even simple, thoughtful touches like a personalized note from the firm's managing partner emphasizing how much they value the potential relationship (without overdoing it) can leave a positive final impression.

**Onboarding Stage:** Once selected, marketing isn't done – the **client experience** in the early phases will determine whether marketing's promises are realized. Modern legal marketing expands into **client service** territory, ensuring that the firm delivers what was promised. Kickoff meetings, client service plans, and early wins should be communicated effectively. Some firms use **client feedback programs** (often run by marketing/BD teams) shortly after a matter starts to check in and show responsiveness. This can catch any issues and demonstrate a commitment to service, making the client feel confident in their choice.

## Key Touchpoints that Matter Most

From a client's perspective, the **most influential touchpoints** tend to be: - **Peer conversation (referral)** – marketing can't script this, but it's the result of long-term relationship-building and client satisfaction. Ensuring current clients are happy *is* a marketing strategy, because they become advocates. - **Initial outreach or content** – if a firm reaches out with a timely piece of insight right when a client is grappling with an issue (e.g. a client alert the day after a new law passes), that touchpoint stands out. It shows the firm is on the ball. Some firms map out content to the client's journey <sup>67</sup> so that at each stage (awareness of problem, consideration of outside help, decision) the client encounters helpful information. - **Website visit** – as discussed, the website experience is crucial. If a GC visits your site and can't quickly find what they want or is unimpressed, that touchpoint can derail interest. Conversely, a site that feels authoritative and client-centric (easy to navigate, speaks to their issues) creates a favorable impression. - **Pitch meeting** – arguably the make-or-break touchpoint. This is where the client assesses the people. Preparation is everything: knowing the client's business, having done homework on their specific issue, and bringing ideas to the meeting. Marketing teams often prepare "**battle cards**" or briefing books on the client for the pitch team, which is invaluable. A touchpoint that also matters is any **follow-up** after the meeting – firms that follow up with a summary or additional thoughts show attentiveness. - **References and external impressions** – a GC might quietly reach out to a friend who used the firm (reference) or recall seeing the firm in the news. These are touchpoints out of the firm's direct control, but the firm's prior marketing and reputation work influence them.

- **Personal interactions** – every call or email during the intake or pitching phase is a touchpoint. How quickly does the firm respond to the RFP or follow-up questions? Are interactions courteous, organized, and value-driven? For example, if the GC emails a question after the pitch, and the firm replies promptly with a detailed, helpful answer, that email is a crucial positive touchpoint.

By mapping out these touchpoints, law firm marketers can identify where they need to focus. Many firms find that **improving responsiveness and personalization in the early interactions** yields great results in winning new clients.

## Adding Value with AI and Modern Marketing Tools

Modern technology – including AI – offers new ways to enhance the buyer's experience and differentiate a firm. Mid-market companies are increasingly tech-savvy and may appreciate law firms that leverage tech to make the engagement smoother. Here are a few ways AI and modern tools can add value:

- **AI-Powered Content and Insights:** Law firms can use AI to analyze vast amounts of legal information and produce insights that are hard to get elsewhere. For instance, an AI tool could summarize trends in the client's industry litigation or predict regulatory enforcement patterns. If a firm comes to a client with *data-driven insights* ("our AI analysis of all OSHA citations in your industry

shows X risk areas"), that is impressive and useful from a client's perspective. It goes beyond the typical anecdotal advice and gives the GC something concrete for their strategy. AI can also help personalize content – for example, sending a client only the alerts that match their interests (some firms are using AI-driven personalization for client alerts). This reduces noise and increases the perceived value of communications.

- **Interactive Tools and Platforms:** Marketing can incorporate tools like interactive self-assessments or risk calculators on the firm's website. A GC could input some data and get a preliminary risk report (e.g. "How exposed is your company to data privacy fines?"). This not only engages the client but provides immediate value and may lead them to seek counsel for more detailed advice. Modern marketing sees the website not just as a brochure, but as a *platform for engagement*.
- **Client Service AI (Chatbots, etc.):** Some firms are experimenting with AI chatbots on their websites to answer basic questions or route inquiries quickly. For a GC visiting the site, a well-designed chatbot could, for example, instantly provide them with a bio of the right lawyer to contact for their issue, or schedule a meeting. This instant gratification can be helpful. However, it's crucial that any AI tool is accurate and aligns with confidentiality needs (clients will shy away if a chatbot feels insecure or too generic).
- **Enhanced Proposal Analysis:** On the firm side, AI can assist in analyzing RFPs and crafting tailored responses faster. This means the firm can turn around high-quality pitches more quickly, which in a competitive selection can impress the client (timeliness and attention to detail are always noted). There are tools that compare a client's stated needs to the firm's experience database, helping marketers assemble relevant experience lists almost instantly.
- **Transparency and Collaboration:** Modern clients appreciate transparency. Tools like client portals (where the client can log in and see matter status, documents, bills, etc. in real-time) are a differentiator. If a firm markets that it uses a portal or project management dashboard, a GC might view that as the firm being advanced in client service. Similarly, using collaborative software (so the client and outside counsel can literally work together on documents or see progress) can create a tighter partnership feeling. Marketing should communicate these tech benefits not as gizmos, but in terms of *client value*: e.g. "You will always know where your matter stands and have instant access to information."
- **Analytics on Legal Spend:** Some mid-market companies still struggle with understanding their own legal spend patterns. A law firm that uses data analytics could review a client's past spend (with their permission) and suggest ways to optimize (like identifying which matters could be handled cheaper or which billing arrangements saved money). If marketing can package this as a value-add service (sometimes called a "legal audit" or "spend analysis"), it shows the firm is proactive about cost-efficiency, which clients love.

One example of how technology can level the playing field: "*Smaller and midsized firms can get a real advantage - AI is leveling the field because they can be nimbler in leveraging tech, giving them equal ability to offer guidance that clients need.*"<sup>68</sup> In other words, a mid-size firm that quickly adopts a useful AI tool might deliver a better client experience than a larger firm that's slower to change. GCs aren't looking for tech for tech's sake, but they do appreciate **efficiency, clarity, and insight**, all of which AI and modern tools can enhance if deployed thoughtfully.

## "Excellent" Legal Marketing from the Client's Perspective

If we put ourselves in the general counsel's shoes, what would *great marketing by a law firm* look like to us? It wouldn't feel like marketing at all – it would feel like *education, value, and a relationship*.

From a client perspective, a law firm that does the following would stand out: - **Understands My Needs:** Excellent marketing would mean the firm's communications are always relevant to me. They send me insights on issues I'm concerned about (and don't spam me with irrelevant stuff). When I visit their website or talk to their lawyers, I feel they "get" my industry and business. Essentially, their marketing is tailored to my world, not generic. As Greentarget's report emphasized, relevance and utility are the bedrock of effective thought leadership <sup>41</sup> <sup>69</sup> – as a client, that's what I want to see.

- **Offers Help Before I Hire Them:** The best firms start helping the client even before any formal engagement. That could be through free seminars, a quick brainstorming call on a potential issue, or high-quality publications that answer questions I have. For instance, if I'm worried about a new law, an excellent firm might proactively reach out with an offer: "We'd be happy to brief your team on what this means for you." This isn't a sales pitch, it's genuine helpfulness – which of course makes me more likely to hire them when needed. A quote that encapsulates this: "*The real value is having bespoke one-to-one conversations... offering a conversation about what [a new development] means to them and their industry, and what they need to do.*" <sup>70</sup>. Great marketing orchestrates those personal, value-rich interactions.
- **Demonstrates Credibility Without Boasting:** Clients do care about a firm's track record, but they prefer to learn about it in context. Excellent marketing might be a subtle mention in a discussion: "When we handled X for another client, we found Y," which shows experience. It's not a glossy brochure of accomplishments thrust in my face, but rather proof points woven into dialogue. Also, a firm with a solid reputation in the market (earned via years of good work and recognized by rankings or peers) gives me confidence. From my view, a truly excellent firm doesn't need to oversell – their expertise is evident and others speak highly of them.
- **Easy to Engage With:** If I decide to explore working with the firm, the process is smooth. They respond quickly to my inquiry, perhaps provide a clear proposal, and make it easy to meet the team. There are no overly formal or cumbersome processes. As a client, I notice things like whether they asked smart questions about my needs (which indicates they're focused on me, not just themselves). A firm that, for example, has a polished proposal but also a personal touch (like "we took the liberty of mapping out a proposed timeline for your project based on our understanding") shows they care.
- **Consistent and Trustworthy:** Excellent marketing sets accurate expectations and the firm then meets them. One pet peeve of clients is when a firm promises the "A team" in marketing and then delivers junior or different people. Great firms avoid that bait-and-switch – the people in the pitch are the people on the project. Also, any materials I saw (like pricing options, approach) remain consistent once we start; there are no surprises. Basically, what was marketed is what is delivered, and that consistency builds trust.
- **Client-Centric Mindset:** Ultimately, from a client perspective, the best "marketing" makes me feel like the firm is *client-centric*. That means they listen more than they talk, they empathize with the pressures I face (like budget limits or internal business dynamics), and they tailor their service

accordingly. For example, an excellent firm might say during the pitch, "We know you have to report to your CEO about legal spend, so we will provide a short quarterly report you can plug right into your presentations." That kind of foresight is gold – it shows they think about how to make me successful internally (not just solve the legal issue). BTI's research on unwritten rules of client service echoes this: great outside counsel help the GC look good by, say, providing updates that can be forwarded directly to the GC's boss <sup>8</sup>. From the client seat, that feels like the firm is a true partner.

In essence, excellent legal marketing is **relationship-building at scale**. It uses content and communication to show expertise and gain trust, long before a formal engagement, and continues to reinforce that trust through every interaction. It's not flashy ads or slogan slogans. It's being in the right conversations, demonstrating genuine value, and making the client's decision to hire you an easy and confident one.

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- Chambers & Partners In-House Counsel Survey 2026 (use of rankings in selection) <sup>54</sup> <sup>22</sup>
- Greentarget/Zeughauser Group State of Digital & Content Marketing 2025 (in-house counsel content preferences) <sup>41</sup> <sup>40</sup>
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- BarkerGilmore and Gouchev Law insights on what GCs want and outside counsel management <sup>13</sup> <sup>9</sup>
- JD Supra / Firesign Marketing analysis of 2024 GC buying criteria (cost pressures, firm traits like tech, DEI) <sup>71</sup> <sup>28</sup>
- General Counsel Excellence Report (survey of GCs on selection criteria) <sup>3</sup>

Each of these sources reinforces aspects of how mid-market corporate clients find, evaluate, and select their outside counsel in today's environment.

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<sup>8</sup> <sup>11</sup> <sup>12</sup> <sup>16</sup> 7 Unwritten Rules for the Best Outside Counsel Relationships - The BTI Consulting Group

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