

Challenges in Mid-Market Law Firm Marketing, Business Development & Attorney Enablement

Mid-market law firms (often 50-300 attorneys) face a range of operational bottlenecks and inefficiencies in marketing, business development (BD), and attorney enablement. Below we break down key pain points in each area, with insights from industry research and experts.

Content & Thought Leadership Pain Points

Attorney Participation: Getting lawyers to produce thought leadership content (e.g. client alerts, blog posts) is notoriously difficult. Attorneys often cite lack of time – most are busy with billable work and “barely have time to eat lunch, let alone plan, shoot, and edit” marketing content ¹. This “lack of time” excuse does have some validity, but experts note there are usually deeper reasons (like discomfort with marketing or aversion to self-promotion) behind lawyers’ reluctance ². Law firm marketers frequently have to **motivate reluctant lawyers** by breaking down tasks or emphasizing the cost of inaction (lost clients) to get their buy-in ³. In short, many attorneys treat marketing/BD as secondary to client work, a mindset that is hard to change ⁴.

Content Creation Process & Speed: Producing a high-quality client alert or article is a multi-step, time-consuming process. Even a simple blog post can take hours of work ⁵. Typically, an attorney (or team) must **identify a timely topic**, draft an analysis, and then route it through **multiple review layers** – often another partner for substantive accuracy, marketing or communications staff for polish, and sometimes even the firm’s general counsel or risk management for compliance checks. **Approval bottlenecks** are common. For example, firms increasingly run *conflicts checks* on thought leadership content to ensure nothing in a blog or alert contradicts positions the firm is taking for other clients ⁶ ⁷. This adds an extra compliance step to avoid “positional conflicts” or embarrassing situations where a firm’s own publication is used against it in court ⁸ ⁹. All these layers mean **speed-to-publish** often suffers – a critical issue when client alerts need to go out quickly after a legal development. It’s not unusual for a supposedly “quick” alert to get held up for days or weeks due to attorney procrastination or protracted edits.

Workflow Bottlenecks: Several factors make content workflows inefficient. First, attorneys’ **billable hour focus** means writing marketing content is low priority and done sporadically, leading to inconsistency. Second, content duties often fall to a small marketing team that must **chase attorneys for input and approvals**, causing delays. One legal marketer noted that biography/content update projects linger on meeting agendas with “all sorts of excuses” from attorneys (“we’re too busy,” “who really reads our blog?”) ¹⁰. In the rush to publish timely insights, some attorneys do invest non-billable time, but that can result in “*lackluster content*” if rushed ¹¹ – a lose-lose if the content isn’t compelling. The result can be a patchy content pipeline with last-minute scrambles and uneven quality.

Content Review & Compliance: As mentioned, risk management concerns impose additional hurdles. Firms must ensure client alerts and articles **do not violate client confidences or positions**, hence the conflicts checks and careful vetting of language ⁶ ⁷. Many firms also require marketing content to be

reviewed for legal accuracy and compliance with bar advertising rules (especially if it approaches giving “advice”). These reviews, often by senior partners, can be slow and overly cautious, further slowing down publication. By the time an article is fully approved, the news cycle may have moved on – a common frustration.

Repurposing (or Lack Thereof): Another inefficiency is failing to fully **repurpose content across channels**. Creating substantive legal content is labor-intensive, so best practice is to reuse and adapt it (blog to client alert, alert to social posts, webinar to whitepaper, etc.). However, many mid-market firms do this poorly. Often a client alert will be sent by email and posted on the website, but not systematically turned into, say, a LinkedIn post series or a bylined piece in an industry publication. Firms that *do* repurpose see greater ROI on content, whereas others “leave content value on the table.” For instance, a firm might publish a great alert on a new law but **fail to transform it into an infographic, social media snippets, or a webinar**, missing the chance to reach wider audiences. This is usually due to bandwidth constraints and lack of a content strategy – marketing teams simply don’t have time to squeeze more juice out of each article. As Jaffe, a legal marketing agency, notes: consistently creating content is hard work, so **strategic repurposing is needed to maximize ROI** on the effort ⁵ ¹². Mid-market firms that lack this strategy end up with one-and-done content pieces that never realize their full potential.

Business Development Support Challenges

Supporting Individual Partners: Marketing and BD teams in mid-size firms are tasked with supporting many partners’ business development efforts, often with limited personnel. Typically, support includes preparing **pitch materials and RFP responses**, doing client research, coaching lawyers on sales techniques, and tracking leads. In theory, the marketing team should act as strategic advisors to partners – helping identify targets, crafting tailored proposals, and guiding follow-ups. In practice, they are often overloaded and operate as a “*reactive service desk*” responding to ad hoc partner requests ¹³. Deborah Farone, a law firm CMO consultant, observes that many firms make the mistake of treating marketing as a mere support function: the team ends up **only responding to partners’ immediate asks** (like “I need a brochure/PPT for Client X meeting”), with little bandwidth to be proactive ¹³. This frustrates both sides – marketers feel like order-takers, and attorneys may feel they aren’t getting **proactive strategic BD help**.

Attorney Frustrations: Partners often feel the marketing/BD support they receive is too generic or slow. Common complaints from lawyers include: “*Our pitch materials all look the same,*” or “*Marketing doesn’t understand my practice’s unique value proposition.*” Attorneys may also be annoyed if they have to wait on marketing for things like updating their client presentations or experience lists under tight deadlines. Conversely, marketers note that many lawyers themselves delay providing necessary input or ignore guidance. A LinkedIn discussion of law firm marketing mistakes highlighted that **many lawyers still treat BD as “optional,”** expecting work to just come in the door ⁴. This cultural disconnect means attorneys might not fully engage with the support offered – and then express frustration when results lag. In essence, lawyers want more high-touch, personalized support (e.g. bespoke research for a specific client pitch, or one-on-one coaching), but a mid-market firm’s team may be too stretched to deliver that consistently.

Pitch & Proposal Inefficiencies: The process of creating pitches and proposals at many firms is **labor-intensive and inefficient**, leading to major pain points. Recent research in 2025 found that **79% of law firms describe their proposal generation process as mainly manual**, with nearly half still literally **cutting-and-pasting in Word from old documents** ¹⁴. Marketing/BD staff report spending **5 to 20 hours per week** on proposals on average – and much of that time is wasted on “avoidable inefficiencies” like

reformatting content, hunting down deal experience, fixing branding, and chasing approvals ¹⁵. In other words, proposal teams spend inordinate effort just reinventing the wheel for each new RFP. This manual approach persists even as clients now demand highly customized, speedy proposals (70% of corporate legal departments expect tailored, timely proposals, up sharply from a few years ago) ¹⁶. The inefficiency is compounded by **siloed data – 68% of firms bypass official data repositories** and resort to “off-system” workarounds to get info, since experience and bio data often live in disparate systems ¹⁷. According to one survey, **more than 60% of proposal professionals said accessing up-to-date experience data is difficult** because matters, bios, and prior pitches reside in separate silos ¹⁸. As a result, marketers waste time searching email threads or legacy databases for relevant qualifications and case experience to include. Collaboration during proposals is another choke point: input is needed from lawyers, finance, etc., yet without a good collaboration platform, teams rely on long email chains and tracked-change documents – a recipe for version control issues and delay ¹⁹. All of this means the proposal process in many firms is **slow, error-prone, and “failing” the firm’s growth efforts** ²⁰ ¹⁵. Partners get frustrated when a proposal is late or looks subpar due to these internal inefficiencies.

Pipeline Tracking & CRM Usage: Tracking business development activities and pipelines is another area of concern. Ideally, firms use a CRM (client relationship management) system to log pursuits, track touchpoints, and manage leads. The reality: most law firms have a CRM, but adoption is abysmal. In fact, **over 78% of law firms have some CRM software, yet only ~7% actually use it effectively** for managing leads and client engagement ²¹. Attorneys notoriously resist logging information in CRM systems; as one study dryly notes, “most attorneys simply don’t use CRM” at all ²². This leads marketing teams to operate with incomplete data – often maintaining shadow spreadsheets or manually pumping lawyers for updates on pursuits. Many mid-market firms track BD pipelines in rudimentary ways (shared Excel files or periodic meetings) because the official CRM data is unreliable. This is a huge pain point: marketers wish they had better insight into who is talking to whom and what the status of each opportunity is, but instead they struggle with **data quality and user adoption issues** in their CRM ²³. Even when firms invest in top CRM tools, they often rate their effectiveness very low. (In one survey, firms rated their CRM’s effectiveness just **5 out of 10 on average**, citing frustrations with data quality and ROI ²⁴.) All of this hampers pipeline management – without accurate pipeline data, it’s hard for marketing/BD teams to forecast, prioritize key clients, or measure conversion rates.

Tools and Tech Gaps: Mid-market firms typically use a mix of tools: a CRM (like LexisNexis InterAction, Salesforce, or others), an email marketing system (e.g. Vuture or HubSpot), and basic web analytics. But **integration between these tools is often poor**, and many firms under-utilize their capabilities. Deborah Farone notes that competitors are using marketing automation, CRM, and analytics in sophisticated ways – if your firm isn’t, “put money and attention to fix it,” she warns, **because “bad plumbing equals bad marketing”** ²⁵. For example, if the CRM isn’t tied into the new matter intake system, the firm can’t easily track which marketing effort led to a new client – resulting in frustration and stagnation in improvement ²⁵. Many marketing teams wish for **better analytics and attribution data** – e.g. to know exactly which content or event led to a new client inquiry – but they lack the systems to connect the dots. Attribution in legal marketing is hard without a custom stack, and most mid-size firms are “stuck with basic analytics” and vanity metrics ²⁶. In short, the tools in place often don’t talk to each other, and **automation is limited**. Marketers end up doing manual data pulls and relying on anecdotal evidence. A telling statistic: even though most firms have invested in CRM, “the vast majority” are essentially using it as an expensive Rolodex, not a true analytics engine ²¹. What’s missing are user-friendly, integrated solutions that lawyers will actually use (or that automate data capture so attorneys don’t have to). The consequence is that firms **can’t easily measure what’s working** – reporting tends to focus on outputs (like number of events, pitches

submitted, website visits) rather than true outcomes (like revenue attributable to marketing campaigns). This lack of sophisticated reporting makes it hard for CMOs to justify budgets and refine strategy, perpetuating a cycle of doing “what we’ve always done” without clear insight into ROI.

Attorney Bio & Profile Management

Keeping Bios Current: Attorney biographies on the website are critical marketing assets (often the most-viewed pages on a firm’s site). Yet keeping them up to date and optimized is a constant headache. Typically, marketers rely on attorneys to periodically send updates – a notoriously unreliable method. Many lawyers **do not proactively update their bios**; a senior associate’s bio might not be touched since they joined, even after they’ve gained significant experience ²⁷. Marketing teams often have to **hound attorneys to get new matters, awards, publications, etc. added**. One Jaffe PR consultant noted that bio update initiatives are often met with excuses like “*my bio is fine*,” “*no one reads bios*,” or “*LinkedIn is the only profile that matters*” ²⁸. Overcoming this internal inertia requires firm leadership support and persistent education that bios do matter (in fact, studies show in-house counsel heavily research attorney bios when selecting firms) ²⁹.

Painful Process at Scale: The process for updating experience, matters, and publications across dozens or hundreds of attorneys is **painstaking, especially at scale**. A marketing team member usually must gather information from each lawyer (via forms or interviews), draft or edit the bio text, get the lawyer’s approval, and then update multiple platforms (website CMS, proposal databases, maybe external directories). When you multiply this by, say, 100 lawyers, it’s a massive project. To illustrate the scale: historically the ratio of marketers to attorneys is very stretched – one survey cited an average of *1 marketing/BD specialist per 27 attorneys* ³⁰. In a 500-lawyer firm, that equates to <20 marketers managing all those bios *plus* all other marketing duties ³¹. Under normal “business as usual” conditions, those few marketers juggle website updates, client alerts, event planning, rankings submissions, etc., for hundreds of lawyers ³¹. **Bio maintenance often gets deprioritized** until a major push is needed (or until a partner complains their bio is outdated). The pain is compounded by technology gaps: information about an attorney (matters, case results, publications) might reside in multiple places – internal databases, the lawyer’s CV, past proposals. Marketers waste time **hunting down details scattered across systems** ³². As Best Lawyers notes, “manual profile updates are slow and fragmented” when bios are stored in various internal files, directories, and social platforms ³². It’s easy to update one profile and overlook another, causing inconsistencies that even clients notice ³³.

Workflow Bottlenecks in Bio Updates: Even with templates, updating bios is largely a manual effort that adds to marketing workload ³⁴. In firms without a dedicated web specialist, a general marketer might be staying late to make bio edits or, worse, **putting them off indefinitely**. Best Lawyers observed that “*smaller teams lack internal marketing bandwidth*” – at small and mid-sized firms, profile updates often fall to someone who already wears multiple hats, leading to delays or neglect ³⁵. One internal data point found that *marketing professionals spend 3–5 hours per attorney on profile updates when done manually* ³⁶. Multiply that across dozens of attorneys and it’s clear why bio updates are so painful. Furthermore, ensuring consistency of tone and style across all bios is challenging – often bios are written by different people at different times, resulting in uneven quality until a comprehensive rewrite project is undertaken. Coordinating a firm-wide bio overhaul means herding all lawyers to provide input and approve changes, which is likened to “**herding cats**.” It’s no wonder marketers joke that the firm website is never truly “finished.”

Impact on Other Work: Stale bios don't just look bad; they actively hamper marketing and BD efforts. Marketers frequently need current lawyer information for various tasks – **RFPs, pitches, directory submissions, speaking proposals** – and if the website bios are out of date, they end up bothering attorneys repeatedly for the same information ³⁷. Jaffe points out that having updated bios saves everyone time because marketing can “pull what is needed off the website without bothering the attorneys at every turn” ³⁸. When bios are neglected, it creates a ripple effect of inefficiency: every new proposal or ranking submission becomes a mini fire-drill to gather basic data that should already be on file.

Rankings & Directory Submissions: Mid-market firms put significant effort into submissions for rankings like *Chambers* and *Legal 500*, as well as industry awards. These processes are **hugely time-intensive for marketing teams** ³⁹. Preparing a Chambers submission, for example, involves compiling detailed matter descriptions, securing client referee names (and obtaining their permission), and writing narratives for each practice – often for dozens of practices on a tight annual schedule ⁴⁰. One legal marketer quipped that Chambers submissions “*take a tremendous amount of time, energy and coordination*”, from gathering references to summarizing key matters ⁴¹. It generally requires months of prep and close coordination with attorneys. Because these projects coincide with ongoing marketing duties, they strain resources heavily. Marketing departments become “submission factories” for a few months a year, and other initiatives may get sidelined during that period. The **bottleneck** is getting timely, quality input from busy attorneys: marketers often draft the initial content, but they need lawyers to refine matter highlights and chase down clients willing to serve as references. Chasing attorneys for this info (and reminding them repeatedly of deadlines) is a familiar pain point. Some firms have started leveraging technology or outsourcing to manage this – for instance, using experience database tools to populate Chambers forms – but many still rely on manual effort. As a result, **stress spikes during rankings season**, and some submissions are rushed or not as strong as they could be. The *pain* is not only operational but psychological: both marketers and lawyers dread the annual scramble. In the worst cases, if resources are too limited, firms may even *skip certain submissions or awards* (deprioritizing them) because they simply can't do it all.

Tools for Bios and Experience: To mitigate these challenges, some mid-market firms are adopting experience management platforms (Foundation, Experience Bank, etc.) or even AI assistance. There's interest in tools that can auto-generate first drafts of bios or keep experience lists updated. For example, Best Lawyers launched an AI tool (“Smithy AI”) aimed at simplifying profile content updates, noting that “*writing or updating lawyer bios requires manual effort*” and when details are scattered across platforms it becomes **time-consuming and inconsistent** ⁴². Such tools can help by centralizing data and even drafting content, but they are new – most firms are only beginning to experiment with them. Meanwhile, the day-to-day reality is that **updating attorney profiles remains a laborious, people-driven process**, and one that is perpetually behind schedule.

Data & Analytics Challenges

Data Wish List: Legal marketing teams today crave better data to inform decisions. Common items on the “wish list” include: more robust **client intelligence** (e.g. insights into client needs, industry trends), real-time data on **marketing campaign performance**, and true **attribution data** linking marketing efforts to new business. For instance, a marketing team would love to know exactly which webinar or alert led a prospect to reach out, or which referral sources drive the most revenue – but mid-market firms often lack this granularity. They also wish for better data on **client engagement** with content (which clients read our alerts? who clicked on our thought leadership piece?) and pipeline progression (how many pitches turned

into wins, and why). Much of this data exists in theory but is not easily accessible due to system silos and low adoption of tools.

Limited Analytics & Attribution: Reporting in many mid-sized firms remains fairly basic. They might track website traffic, email open rates, event attendance, and perhaps high-level origination numbers. But tying any of these to actual revenue or ROI is challenging. As a result, marketing decisions can be driven by anecdote or what the partners *feel* is working rather than solid data. **Marketing attribution** – the art of connecting a lead or client back to specific marketing touches – “is tricky” for law firms, but it’s increasingly important ⁴³. Few mid-market firms have multi-touch attribution models in place. At best, they may credit the “last touch” (e.g. the originating source of a new matter if captured at intake). However, without integrated systems, even knowing the last touch can be manual. The **sophistication gap** is evident: law firm marketers know that attribution could tell them which content actually generates consultations rather than just clicks ⁴³ ⁴⁴, but implementing that requires connecting web analytics, CRM, intake forms, etc., which is often beyond their current tech setup. “Unless you have a custom-built marketing stack (which most small firms don’t), you’re stuck with basic analytics,” one legal marketing blog says about attribution ⁴⁵. In short, reporting tends to measure outputs (like number of alerts published or events hosted) more than outcomes (like client acquisition cost or lifetime value), simply because the data linkage is not there.

CRM and Marketing Automation Woes: As mentioned, CRM usage is a major pain point. The majority of firms have a CRM system, but most struggle to get value from it. Surveys have found that **only 7% of firms use their CRM effectively** for managing leads and engagement ²¹. Many partners view entering data as a chore, and data quality decays over time (out-of-date contacts, incomplete records). Marketing automation tools (for email campaigns, tracking website behavior, etc.) are also under-utilized. Some firms have tools like HubSpot or Marketo, but they may not be fully implemented due to lack of expertise or integration challenges. The net effect is **broken systems**: marketers don’t trust the reports coming out of CRM or email platforms because they know the underlying data is spotty. This leads to frustration – for example, a CMO might want to run a report of top cross-selling opportunities among existing clients, but if attorneys haven’t logged client interactions or interests in the CRM, that report is meaningless. In a Legal Marketing Association discussion, it was noted that if your CRM “isn’t great or doesn’t tie in to your intake process, it leads to frustration and standstills” – essentially paralyzing marketing efforts ²⁵. That “bad plumbing” – e.g., disconnected systems – prevents marketing teams from even answering basic questions like “*Which of our practice group’s blog posts led to new matters last year?*” with any confidence.

Measuring What Works: Because of these data challenges, many mid-market firms have a hard time **measuring what’s working in their marketing and BD**. They may track high-level indicators: revenue growth, number of new matters, website inquiries. But isolating the impact of specific initiatives (content marketing, social media, seminars, etc.) is more art than science. This often leads to an internal skepticism about marketing: partners might question the value of marketing spend if there isn’t concrete proof. Marketers, for their part, wish they could better demonstrate ROI to secure more budget. There’s a desire for more **sophisticated reporting** – dashboards that show, for example, conversion funnels from initial contact to signed engagement, or attribution models that credit each touchpoint. Some firms are starting to invest in such reporting. A study by the Legal Sales and Service Organization in 2023 found **over 80% of firms have a CRM, but only ~20% rate it as effective** for marketing/BD needs ²³, indicating a large gap to fill. As firms grow more data-driven, mid-market marketing teams are trying to catch up, but they face resource and technology constraints. Until those are resolved, **marketers will continue to operate with incomplete insight**, making it harder to double down on truly successful tactics or to pivot away from ineffective ones.

Resource Constraints in Marketing Departments

Lean Teams (Marketer-to-Lawyer Ratios): Mid-market law firm marketing teams are often *very* lean relative to the number of lawyers. Benchmark studies by Calibrate Legal show roughly **1 marketing/BD staff per 9–12 lawyers (or partners) on average** ⁴⁶. In North America, it skewed around one marketer per 12 partners in a 2020 survey ⁴⁶. When considering all attorneys (not just partners), ratios like 1:20 or 1:30 are not uncommon. In practical terms, this means each marketing professional might single-handedly support 20–30 lawyers or more. In one example, an older industry figure cited **1 marketer to 27 attorneys** ³¹ – which was described as a typical scenario where a small team must manage everything from attorney bios to events for dozens of lawyers. With such ratios, it's no surprise that marketers feel stretched thin (one LMA member quipped they feel like they're doing the work of two or more people) ⁴⁷. There is simply *more demand* (for proposals, content, events, updates, etc.) than the team can adequately supply.

Overstretched Teams & Deprioritized Tasks: Because of limited headcount, marketing teams must triage their workload. **Client-facing, urgent needs usually win out** – e.g. a proposal needed for a big pitch tomorrow will trump updating the website or analyzing last quarter's marketing metrics. This means important but not urgent work often gets deprioritized. Common casualties of short staffing include: *strategic planning, consistent content creation, analytics, internal marketing training, and long-term initiatives*. As one marketer noted, when you're alone or on a tiny team, you have to be "very vigilant about strategizing everything so I can work effectively," and even then many wish-list projects get pushed off ⁴⁸. For instance, a firm might want to overhaul its branding or launch a client feedback program, but the marketing team is too busy handling day-to-day fires to make progress on those larger initiatives. Similarly, **proactive marketing campaigns** (like a thought leadership series or an industry-targeted seminar program) may never get off the ground if the team is perpetually in reactive mode. Deborah Farone observed that if the marketing team is consumed with only responding to partners' immediate requests, they're not able to drive proactive campaigns that yield long-term results ¹³. This is often a resourcing issue – "they may need additional staff" or better tech to handle repetitive work, she notes ¹³. The result is that firms under-investing in marketing staff end up **leaving growth opportunities on the table** because the team simply can't execute everything.

Bandwidth Bottlenecks: Marketing departments in mid-size firms tend to be *generalists* out of necessity – each person wearing multiple hats (events, digital, content, PR all handled by the same few people). This means when a major project drops (a big event, a website redesign, a key RFP), it can consume the team's capacity and cause other work to stall. For example, if a firm is hosting a large client conference, the small marketing team might spend weeks focused on invitations, materials, and logistics – during which time things like social media posts, blog updates, or newsletter schedules slip. There is little redundancy; if one marketer is out on leave or leaves the firm, the gap is keenly felt. One LMA survey response mentioned it took *two years of asking* to get approval to hire even a part-time marketing coordinator ⁴⁹, illustrating how stretched some teams are before leadership adds resources.

CMO Wish List: Law firm CMOs and marketing directors in resource-constrained environments often wish they could do more **high-level strategic marketing** rather than just tactical execution. They'd like to invest in stronger brand differentiation, competitive intelligence, client experience programs, and innovative marketing tactics (like new content formats, marketing automation, AI tools, etc.). Many know *what should* be done – e.g. segmenting the client base and tailoring marketing to each segment, or developing a robust alumni network for referrals – but they lack the staff or budget to implement these ideas. They also wish for more **training and professional development** for their team. Underinvesting in marketing training and

technology is a common mistake in law firms ²⁵ . CMOs would love to have, say, a data analyst or a content specialist on the team, but mid-market firm budgets often don't allow for highly specialized roles. As a result, the existing team muddles through as best they can, but some sophisticated marketing practices (common in other industries) are out of reach.

To justify additional resources, marketing leaders try to make the case with data and examples. They might conduct a gap analysis showing all the projects they *cannot* do with current staffing ⁵⁰ . Tracking lost opportunities or back-burnered initiatives is one way to demonstrate the cost of being understaffed. Still, many law firm leaders remain cautious, viewing marketing as overhead. This is slowly changing as competition drives a greater appreciation for marketing, but in mid-market firms, the marketing/BD team is often playing catch-up to what larger firms are doing, with far fewer hands on deck.

In summary, **resource constraints force mid-market marketing teams into a reactive posture**, limit their ability to innovate, and create personal burnout risks – all pain points that firm leadership must address if they want more impactful marketing.

Post-Merger Marketing Pain Points

Law firm mergers (or large acquisitions) introduce a unique set of marketing challenges on top of the usual ones. Mid-market firms that merge (often to gain scale or new capabilities) must rapidly **consolidate marketing operations, technology, and messaging**, which is a complex undertaking.

Merging Marketing Teams: Post-merger, two previously separate marketing teams (often of different sizes and cultures) must become one. This can lead to role redundancy, uncertainty, and even turf issues. Deciding “who leads what” is delicate – e.g. which CMO or marketing director stays in charge, how titles and responsibilities are sorted out. During integration, the combined team is expected to present a unified front, but internally they are aligning processes and getting up to speed on the legacy of the other firm. All of this happens under intense pressure to execute merger announcements and combined marketing campaigns immediately. Small wonder integration is often rocky.

Tech Stack Consolidation: One of the first big hurdles is consolidating marketing tech and data. Deborah Farone cautions that it's a **misstep to wait until the end of merger discussions to address marketing systems** – things like CRM, deal trackers, experience databases ⁵¹ . Early planning is needed for how to merge or choose between systems. Each firm may have different email marketing software, different CRM (or one firm has none at all), different proposal generators, etc. If not handled, the combined firm could be stuck with disconnected, duplicative systems that hamper communications. Farone advises strategizing upfront about **how marketing tech operations will consolidate** and how the firm will market itself *during and after* the merger ⁵² . For example, if each firm has a separate mailing list and CRM, those need to be merged to ensure clients get consistent messages. Ensuring a smooth roll-out of the “right” technology for the new firm is critical ⁵³ . Often, the merged firm will pick one CRM (retire the other) or migrate data into a new unified system. This requires not just IT work but also cleaning and mapping data – a huge task for marketing ops. Poor early decisions here can lead to chaos (e.g., lost contacts, duplicate entries, or incompatible systems). Farone emphasizes that a single person or small team should be empowered to drive the marketing ops integration, with support from firm leadership ⁵⁴ . **If tech integration is fumbled, it can result in scattershot marketing efforts and missed opportunities to cross-market to the combined client base** ⁵⁵ .

Brand & Messaging Alignment: Crafting a unified brand and message is perhaps the most visible marketing challenge post-merger. The merged firm needs to articulate *why* the combination is beneficial and what the new firm stands for – and do so to multiple audiences (clients, media, recruits, internal lawyers). Many firms handle this too cautiously and miss the opportunity. As one brand expert observed, merger announcements often stick to safe platitudes like *“We merged to serve clients better; the firms share values; nothing important will change.”* Such statements are “unobjectionable. They are also strategically empty.”⁵⁶ Over-reassuring that “nothing will change” can breed skepticism, because everyone knows a merger means change^{56 57}. The pain point here is that leadership often spends more time debating the firm name or other internal politics than developing a bold **market positioning** for the new firm. A merger presents a rare brief window when the market is intensely listening – a chance to redefine the firm’s story^{58 59}. If the firm’s messaging is muddled or bland, that window closes with a whimper. Internally, misalignment on brand can cause confusion and even cultural clashes (each legacy firm’s lawyers clinging to their old identity). Achieving a coherent brand requires agreeing on core values, messaging points, and possibly a new visual identity, all under tight deadlines. It’s a lot to handle: from logos and marketing collateral rebranding, to updating directory listings, social media profiles, and signage – *and doing it in sync*. Any delay or inconsistency (e.g., two months after merger, one office still uses old letterhead) sends a message of disorganization. Marketers often have to push through these changes while navigating sensitive egos around firm names, logo colors, and tagline choices.

Website & Digital Presence Consolidation: Merging two law firm websites into one is a massive project and one of the most immediate marketing priorities post-merger. Typically, each firm has a robust site with hundreds of attorney bios, practice descriptions, articles, and more. Post-merger, the firm must decide: take one site and integrate content from the other, or build an entirely new website for the combined firm. Either way, it’s a heavy lift. As one legal CMS provider described, **when two firms come together, they usually have two websites – one will be retired or both replaced with a new one**, which involves migrating volumes of content from at least one CMS to another⁶⁰. Marketers must evaluate which web platform to keep, how to technically migrate data, and critically, how to **reorganize content and navigation** to reflect the new firm’s structure. Each firm may have categorized practices differently (one by industry, one by service, etc.), so the merged site’s information architecture needs to be reconciled⁶¹. This means deciding on a common taxonomy for practice areas, industry focus, etc., and ensuring every piece of legacy content is re-tagged appropriately. It’s a meticulous task that often falls on marketing/BD teams to manage, usually in collaboration with IT or web consultants. If done hastily, important content can get lost or buried. There’s also the timing aspect – ideally the new website launches at or soon after the merger announcement, which compresses the timeline for all this work.

Integrating Attorney Bios and Experience: Attorney bios deserve special mention in mergers because they are the most visited part of law firm sites and crucial to maintain. Combining two firms’ attorney rosters means updating bios for *all* lawyers to the new brand format and ensuring their experience is described in the context of the new firm. According to one integration expert, consolidating attorney bios is “possibly the tallest” task in marketing integration⁶². It involves moving bio data from one system to another, unifying styles, and dealing with a host of details: new photography, merging duplicate bios if some lawyers were listed in both firms (e.g., laterals who had moved), handling any differences in how achievements are listed, etc.⁶³. Importantly, attorneys must be assigned to the proper new practice groups on the site and linked to the relevant combined experience database or representative matters list⁶³. For marketers, this is painstaking and must be done under a tight timeline. They also have to **communicate with the attorneys and manage their expectations** through the change⁶². Lawyers can be very sensitive about their bios – after all, it’s their personal professional profile. In a merger, some may

have to compromise on how their information is presented (to fit a new template or firm-wide standard), which can cause friction. Marketers often act as diplomats, explaining why certain changes are necessary and assuring attorneys that their accomplishments won't be lost. The **human aspect** should not be underestimated: "ushering in change... is difficult for all humans, and especially for attorneys whose firm bios are meaningful both professionally and personally" ⁶⁴ . Managing dozens or hundreds of "mini negotiations" over bio content in a short time is a big pain point.

Internal Coordination and Culture Clash: Post-merger marketing also involves internal education – getting everyone on board with the new messaging and marketing approach. Often the two legacy firms had different cultures around marketing (one may have been more aggressive in outreach, the other more conservative). The combined marketing team must establish new processes and perhaps train lawyers on using new systems (e.g., if one firm used a CRM and the other didn't, now everyone is expected to use one unified CRM). This change management is an internal marketing project in itself. Without careful handling, attorneys from one legacy firm might resist the new processes ("why do I have to fill out this CRM field now?") or feel that decisions favor the other firm's way of doing things. Leadership has to champion the unified approach to avoid an "us vs them" split in marketing efforts.

Opportunity vs. Execution: Finally, while law firm mergers create *opportunities* for marketing (greater market attention, cross-selling new services, etc.), achieving those gains requires swift, efficient execution of all the above. The irony is that during the merger integration phase, marketing teams are so busy fixing infrastructure and putting out fires that they might not immediately capitalize on the buzz. There is often a **period of reduced marketing output** – fewer thought leadership pieces or delayed initiatives – as the team focuses internally on integration. This can cede the initial narrative to the media or competitors if not carefully managed. Best practices suggest having a strong communications plan ready the day the merger is announced and a stream of content following it, to control the message. Any fumbling (like inconsistent statements or a long delay before the new website or materials appear) can blunt the merger's impact.

In essence, post-merger marketing pain points boil down to **integration headaches**: unifying people, systems, and messaging in a very tight timeframe. Successful integration requires systematic planning and often some outside help (consultants or extra staff) to get it done right. As one merger integration article put it, *integration is the fulcrum between a merger's success or failure*, encompassing business strategy, brand, communications, culture, and tech ⁶⁵ . Marketing sits at the center of that, and if the marketing integration falters, the whole merger can suffer from a branding and client relations perspective. Firms that recognize these pain points early and devote the necessary resources to address them stand the best chance of turning a merger into a marketing success story rather than a cautionary tale.

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