

First-Class, Face-to-Face Connections with Clients, Staff and Future Business Partners

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THANKS TO SOCIAL MEDIA AND Internet-facilitated communications—from e-mails to Skype to Twitter to Facebook to Instagram to teleconferencing—opportunities for face-to-face interaction with clients and potential clients, and staff, are less common. But by having holiday parties that bring your customers and your team together, you can rekindle personal connections that still go a long way toward building long-term business relationships.

In addition to holiday parties, VIP meeting- and event-driven client retention and acquisition initiatives are valuable tools for connecting with the people you do business with. Using meeting and events for continuing education programs (for staff and clients) or for fundraising and recruitment are a few of the added benefits of old-school networking programs, which the Commerce and Industry Association of New Jersey (CIANJ) is seeing a growing interest in.

"Our members are attending CIANJ networking events in greater numbers, as they seem to be looking for new ways to connect with business leaders and potential clients," explains CIANJ President John Galandak. "While our speakers are always a popular draw, many executives tell us that they want to spend more time talking with and listening to others in the business community to learn and build their book of business."

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COMMERCE recently asked many of New Jersey's top accounting firms, credit unions, colleges and universities, and law firms to discuss how VIP meetings and events are helping to support their bottom lines and strategic goals. Here are their insights and observations.



ACCOUNTING FIRMS



Citrin Cooperman

By Alex Serrano, CPA,
Co-Managing Partner

Events, both internal and external, are significant components of our client relations and business development programs. Additionally they are an important part of employee training for business networking and account development skills. Our firm-sponsored events consist of thought leadership, social networking and client appreciation programs. The aim is to not only be a source of knowledge to our clients, but to also let them know that we appreciate them. We involve our employees in these

events to give them an opportunity to connect with clients and develop their own relationships, as well as to become comfortable in a social networking environment that puts them in touch with new contacts and prospects. One specific event activity that we find especially helpful in relationship building is sporting events. We reserve and purchase space at multiple sports venues in the Tri-State area and use them to entertain our clients—once again, as an opportunity to show them we appreciate them and also provide a pressure-free environment where everyone can "let their hair down" and see the human side of one another, not just the business side.



CohnReznick LLP

By Philip Mandel, CPA, CFP,
NYINJ Regional Managing
Partner

CohnReznick frequently hosts events to provide thought leadership and develop and deepen relationships. Our Financial Managers Learning Forum (FMLF) program is one of our successful event series and serves as a premier resource for CFOs and other financial managers to keep up with changing regulations, emerging trends and best practices. For more than 20 years, FMLF has provided both CPE-accredited courses to attendees and a way for our professionals to network with their clients and prospects. One of our most innova-

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ings, the college has implemented a number of key student-service improvements in library hours, laboratory availability, parking tags, professor office hours, book costs and class schedules.



William Paterson University
By Dr. Kathleen Waldron, President

William Paterson University's prestigious "Distinguished Lecturer Series," now in its 37th year, continues to attract large audiences to our campus, bolstering the university's reputation as a cultural and intellectual core of the community. The program provides thought-provoking presentations from world-renowned leaders and experts such as Margaret Thatcher in 1999, Al Pacino in 2010 and Gloria Steinem in 2012. On October 29, we will host Lesley Stahl in a discussion of her groundbreaking career as one of the first prominent female television reporters. In conjunction with each individual program, we conduct dinners and/or receptions to support our relationships with alumni and friends. Many of the speakers have also met with small groups of students, and classes often attend the lectures. The Distinguished Lecturer Series is one of dozens of events that we conduct each year to successfully engage our full range of constituents, including prospective students and their families, alumni and friends,

and our community that extends beyond the campus. Other events include the Orlando Saa Foreign Language Poetry Recitation Contest and New Jersey History Day, which each bring hundreds of high school students to campus, and the Ghandian Forum for Peace and Justice, which attracts students, teachers and community members.



LAW



Callagy Law
By Sean Callagy, Esq., President

Callagy Law's philosophy is to offer massive value to prospective clients through which their own business objectives can be more readily attained. We feel that we should give in order to receive, and a primary means we have chosen for doing so is through periodic meetings of the Callagy Business Mastery Club (CBMC).

Begun in 2013, the CBMC is an evening seminar held every 30 days to 90 days and is conducted, by me, for the benefit of business owners seeking more fulfillment, whether financial or personal, from their professional efforts. The methodology is one that I have developed over a period of 18 years as an entrepreneur, attorney and business coach, and have used to build two successful law practices, a coaching practice and a corporate training practice. Sharing the benefit of my experience creates in attendees an appreciation of not just the limitations they may be placing on themselves, but how their objectives can be more clearly defined and effectively pursued. Perhaps not surprisingly, the personal relationships that are formed at the CBMC often lead to one of attorney-client.



Cole Schotz P.C
By Glenn Kazlow, Esq., Administrative Partner and General Counsel

There's an old salesperson proverb that says, "You can't mail a handshake." Bringing people together in meetings nurtures relationships, spurs new ideas and provides a platform to transfer knowledge in ways which are often more effective than mere written words. Meetings allow people to feel connected and engaged. At our firm, we meet with clients, prospective clients, vendors and colleagues every day. By the very nature of the confidential relationship lawyers have with their clients, meetings are a necessary way to understand complex facts and explain legal issues. The give and take of those meetings are crucial to a lawyer's ability to properly represent their clients. We also use meetings for continuing legal education programs, technology and legal training and administrative coordination. With the use of technology, it is common for participation to be both in person and via video conference. Lastly, we often host social events, such as cocktail receptions, to create networking opportunities for our business clients. Those introductions have very often developed into very profitable



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relationships and an appreciation for our willingness to connect people. We have found that the personal dynamic of such events cannot be replicated by a phone call or e-mail.



Gibbons P.C.

*By Patrick C. Dunican Jr.,
Esq. Chairman, Managing
Director*

At Gibbons, our most successful client events are our annual full- and half-day client seminars on the legislative, judicial and marketplace developments impacting our clients' businesses—particularly in areas with constantly changing regulations and emerging law. Our client relationships are valued business partnerships; these

employee classification, paid sick leave laws and emotional distress damages. Our popular "E-Discovery Conference" guides companies on developing regulations regarding the management, collection and production of electronic data, addressing cutting-edge concerns including the proliferation of mobile devices and cloud-based apps in the workplace. These programs provide comprehensive legal analyses and practical perspectives targeted to in-house lawyers and business professionals, presented by Gibbons attorneys and featured speakers who are among the most respected voices in their fields, with ample time built in for Q&A and discussion.



Norris McLaughlin & Marcus, P.A.

*By Alison Galer, Esq.,
Managing Partner*

We frequently hold complimentary educational seminars on relevant topics we think our clients and potential clients will find of interest. Recent seminar topics have included Affordable Care Act requirements, hot topics in labor and employment, and business divorce. These seminars prove to be a good way for the firm and attorneys to foster relationships with current clients as well as build new relationships with prospective clients. We also offer live in-house CLE programs to our attorneys. These programs are presented by our attorneys and not only assist with their continuing education require-

ments, but promote cross-selling within the firm. Lastly, we provide an associate development program for all our associates. Our sessions vary by topic and include relationship building, marketing techniques and creating a personal brand. These sessions provide our associates with the knowledge they need to mature into well-rounded attorneys.



NPZ Law Group, P.C.

*By David H. Nachman, Esq.,
Managing Attorney*

While the Internet continues to present amazing opportunities to disseminate U.S. immigration law information quickly, the lawyers at the NPZ Law Group continue to conduct seminars onsite for our corporate clients as well as at conference centers throughout the nation. We continue to find that our potential HR clients want/need personal support. We conduct training programs at Hilton facilities both within and outside the United States about U.S. immigration law options for investors and multinational transferees. Additionally, we continue to use Marriott Corporation and the Intercontinental Hotel Chain (Ana) to support our conference needs throughout the country and abroad. The nature of our corporate and business immigration law practice continues to be of a personal nature, so we continue to seek partnership relationships with hospitality facilities that are friendly, flexible and facilitating. ■



educational events demonstrate our commitment to the overall success of our clients' ventures by helping them smoothly navigate evolving legal and business environments. Our comprehensive "Healthcare Coverage" symposium advises various healthcare industry constituencies on such up-to-the-minute topics as Affordable Care Act requirements and the shift from fee-for-service. Our "Employment & Labor Law Seminar" addresses recent employment legislation, court decisions and agency initiatives—plus upcoming trends and cases to watch, recently covering

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