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THWARTING RANDOM
ACTS OF MARKETING:

A Lawyer's Guide to Making the Most of IBA Toronto 2025

Introduction

This guide is designed to help lawyers attending the IBA Annual Conference in Toronto make the most of their time on the ground.

Created for legal marketers to share with their attending partners, it offers clear, practical advice for planning and executing a successful IBA week. Whether you're attending sessions or focusing on informal coffee chats and fringe events, this guide will help you set goals, build relationships, and track meaningful outcomes. It includes tips, explanations, and optional checklists and worksheets to support your strategy before, during, and after the conference.

Audience: Legal marketers to share with partners attending

Purpose: Help lawyers plan and execute effectively during IBA week

Format: Tips first, followed by brief explanations; includes optional checklists/forms

Distribution: Through the LMA member email distribution

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1 Set Clear Goals

Before you arrive, ask yourself:

- Why am I attending?
- How will making connections lead to new revenue?
- How much new work could I conservatively generate from this week?

Whether you're aiming to reconnect with a key client, meet lawyers in a new jurisdiction, or explore a new practice area, defining your goals helps you focus your time. A few well-chosen actions will yield better results than trying to do everything. Putting down a number goal is hard; however, it will be very helpful in articulating ROI for this year and in the years to come, so do it even if it is uncomfortable. Use your answers to guide who you meet, which events you prioritize, and how you follow up.

2 Know Who's Attending (Even If They're Not on the List)

The IBA delegate search tool only shows who officially registered — but many valuable contacts attend without signing up for sessions.

Ask yourself:

- Who do I want to meet that might be in town, even if they're not on the delegate list?
- Has anyone in my firm heard about clients, peers, or alumni planning to be in Toronto?
- Can marketing or BD help surface informal attendance?

Tap into your firm's internal chatter, client teams, and alumni networks. Often, the most strategic meetings happen outside the formal conference — over coffee, dinner, or a quick walk between hotels. A little pre-conference sleuthing can go a long way.

3 Leverage Existing Relationships

If you have an established referral network, start there.

Ask yourself:

- Which contacts have sent me business before?
- Are they planning to be in Toronto next week?
- Can I reconnect with them while they're in town?

Warm referral sources are your highest-probability opportunities. Someone who has already trusted you with work is more likely to do so again. Reach out before the conference to ask if they'll be around — even if they're not officially attending. A quick coffee or dinner with a known referrer can be more valuable than any panel.

IBA week fills up fast — and not just with official sessions.

Ask yourself:

- Which meetings or events will move the needle for my practice?
- Where do I have the highest chance of deepening a relationship or generating new work?
- What's my backup plan if something gets canceled or rescheduled?

Start with your highest-value targets and build your schedule around them. Leave room for flexibility — some of the best meetings are spontaneous. Prioritize quality over quantity: three meaningful conversations will do more for your practice than ten rushed ones. And don't forget to block time for follow-ups, quick notes, or even a breather. Many firms organize events, breakfasts, dinners, and parties around the event. Tap into your law firm referral network to get yourself invited to these events as well. It's always good to have an active referral source engage with a potential referral on your behalf.

4 Track Conversations in Real Time

IBA week moves fast. If you don't capture details as they happen, you'll lose them.

☐ **Ask yourself:**

- Who did I meet today?
- What did we talk about?
- What's the next step — and who owns it?

Use whatever method works best for you:

- Your CRM or a notes app
- A voice note recorded right after the meeting
- A quick scribble in your notebook
- Even the back of a business card

Include names, firms, topics discussed, and any follow-up actions. Even a brief note can save hours later and make your follow-up more personal and effective.

If your firm uses a relationship intelligence platform, take advantage of post-meeting capture tools to log interactions and surface shared connections. The goal is to turn conversations into coordinated follow-ups that drive results — not just a stack of business cards.

DOWNLOAD CONTACT TRACKING SHEET →

5 What Do You Talk About?

Keep it light. Most IBA conversations happen over coffee, in hallways, or between sessions — not in boardrooms.

- [ ] **Ask yourself:**
  - What's the most relevant thing we can connect on?
  - How can I make this conversation valuable for them — not just for me?
  - What's one insight, introduction, or idea I can offer?

- [ ] **Practice your elevator speech. It should be:**
  - ✓ Factual: Say what you do clearly
  - ✓ Memorable: Share something that sticks
  - ✓ Conversational: Make it interesting to entice continuing the conversation

ⓘ **Printed or electronic business cards?** Sometimes the old ways are the best ways. While electronic methods like digital contact sharing are convenient, they can easily get lost among the many contacts in your system or Outlook contacts. Physical business cards remain a reliable way to capture and organize connections.

Examples for a big-ticket M&A lawyer:

" *I help large companies buy and sell businesses — mostly cross-border deals in the AI space. Lately, I've been working on transactions where regulatory timelines are the biggest challenge."*

" *I'm an M&A lawyer focused on deals over $500M. Most of my work is international, and I've been seeing a lot of activity in energy and infrastructure lately."*

" *I advise on complex acquisitions — especially where there's a lot of moving parts across jurisdictions. Right now, I'm helping a client navigate a carve-out deal that touches five countries."*

" *These open the door for follow-up questions like "What's driving that activity?" or "Are you seeing more private equity involvement?" —* and that's where the real conversation begins.

6 Pause Midweek to Reassess

By midweek, your calendar's probably overflowing — and so is your inbox. Take a moment to step back and refocus.

☐ **Ask yourself:**

- Which two meetings have been the most valuable so far — and why?
- Do I have clear next steps, or just a "nice to meet you"?
- Where am I spending time that's not yielding relationship depth or opportunity?

Use this check-in to revisit your goals and calendar with fresh eyes. If everything feels reactive, pick one thing you can do intentionally before the conference ends — a key introduction, a quick dinner, or a follow-up note that moves the ball forward.

Pro tip: Be willing to cut or reprioritize. Not every event or coffee meeting needs to happen. Focus your limited time on higher-probability opportunities — especially where you already have relational equity.

7 Be Willing to Cut or Reprioritize

Not every meeting needs to happen. By midweek, it's easy to feel like you're just going through the motions — but your time is too valuable for that.

Ask yourself:

- Which meetings are truly driving relationship depth or opportunity?
- Where am I spending time that's not aligned with my goals?
- What can I cancel, reschedule, or replace with something more intentional?
- How am I feeling — physically and emotionally? Do I need a break to be more effective?

Give yourself permission to say no. A strategic "skip" can open up time for a more meaningful conversation, a needed recovery break, or a follow-up that moves the ball forward. IBA is a marathon, not a sprint — pacing yourself is part of the strategy. Checking in with your energy and mindset midweek can help you stay sharp and present for the conversations that matter most.

And if this whole exercise feels intimidating, partner up. Attend meetings with a colleague from your firm or someone you know at another firm. Tag-teaming conversations can ease the pressure, help you stay accountable, and make the experience more enjoyable — especially if you're new to IBA or networking in general.

8 Follow Up Promptly and Rank Your Contacts

The conference may end Friday, but the real work starts Monday. Make certain to accommodate for this time in your calendar. (This won't be easy since you've been away from the office for a few days.)

- [ ] **Ask yourself:**
  - Which contacts are most likely to lead to new work or referrals and what should I say?
  - Which conversations felt like the start of something — not just a polite exchange?
  - What's the best way to keep the momentum going and has anyone else at my firm already followed up with this contact?

- [ ] Send personalized follow-ups while the conversation is still fresh. Mention something specific — a shared client, a topic discussed, or a next step you agreed on. If you're not sure what to say, even a simple "Great to meet you — let's stay in touch" can go a long way. Large language models/AI can help ease the process; however, make certain to check the work.

> Not every follow-up needs to be equal. Prioritize your outreach based on relationship strength and opportunity.

8 Follow Up Promptly and Rank Your Contacts (cont'd)

- [ ] Rank your contacts into tiers. Those at the top should get a thoughtful, personalized follow-up. Those in the middle might get a lighter touch — a LinkedIn connection or a short email. And those at the bottom may just need to be logged for future reference.

- [ ] Make sure to log the contact and everything you discussed in your CRM, ERM, or other tracking systems. Mark them for follow-up and track all communications, introductions, and referrals — both incoming and outgoing.

- [ ] Before reaching out again, check to see if anyone else at your firm has met or spoken with that contact recently. Shared visibility into who's already connected helps coordinate outreach, avoid overlap, and strengthen the firm's collective relationships. This helps you connect the dots later and measure the real impact of your IBA week.

> This is easier said than done, so make sure your legal assistant or coordinator is ready to assist. They can help capture details, update systems, and ensure that the important information does not slips through the cracks.

- [ ] Add new contacts on LinkedIn and other professional networks. When you send a connection request, include a short note to remind them who you are and where you met. It's a simple gesture that reinforces the relationship.

- [ ] Engage with their posts, comment thoughtfully, and share your own insights from the conference. Whether it's a quick takeaway, a photo from a panel, or a reflection on a trend you noticed, your network will appreciate the perspective — and it keeps you visible in a meaningful way.

9 Share Learnings with Your Team

IBA isn't just about individual wins — it's a chance to bring back insights that benefit your whole firm.

☐ **Ask yourself:**

- What did I learn that others at my firm should know?
- Were there trends, topics, or contacts that could help my colleagues?
- Did I hear anything that could shape our strategy or client conversations?

Take time to debrief with internally your team. Share key takeaways from sessions, conversations, and market observations. Even a short recap — in an email, team meeting, or internal post — can spark ideas, strengthen relationships, and help others prepare for future conferences.

And don't underestimate the power of sharing data. Sending out reports internally that include inbound and outbound referrals can activate your firm's broader data ecosystem. Lawyers love to point out what's missing — and that instinct can be a strength. When they see gaps or inaccuracies, they'll often jump in to correct or add context. Over time, this builds a culture of sharing naturally, where everyone contributes to a more complete and useful picture of the firm's relationships and opportunities.

10 Make Relationships Measurable

IBA isn't just about showing up — it's about outcomes. That said, tracking too many bits of data will exhaust you, make the project seem too large, and lesson odds for success.

☐ **Ask yourself:**

- Which conversations led to introductions, new matters, or client opportunities?
- Where did I see momentum continue after the conference?
- What activity moved the needle for my practice or my firm?

Go beyond counting meetings. Look at what those meetings produced. Did a coffee chat lead to a referral? Did a dinner spark a new collaboration? Did a follow-up email result in a pitch or a new matter?

Leverage relationship signals your firm is already generating, like emails exchanged, meetings on the calendar, and shared clients, and make those insights visible across teams. Seeing where engagement is building helps identify the warmest paths for follow-up and collaboration.

☐ Track these outcomes in your CRM or ERM. Wherever possible, automate the capture of these interactions so that busy lawyers spend less time entering data and more time acting on it. Consistent visibility, not manual effort, is what makes tracking sustainable. Look for patterns — which types of meetings, contacts, or introductions tend to generate results? Share those insights with your marketing and BD teams so they can help you scale what's working.

High-growth firms stand out because they connect business-development activity to visible outcomes, not just attendance.

The goal isn't just to attend IBA — it's to turn participation into progress.

To support this, refer to the **Daily Planner** and **Target Worksheet (Excel spreadsheet)** included with this guide. Use them to track your meetings, referrals, and follow-ups in a structured way.