

Murray, Plumb & Murray
Brand Discovery

Submitted by A. Smith Consultancy

May 2016

Murray, Plumb & Murray

Brand Discovery

Introduction

This report is based on the brand discovery process we facilitated for Murray, Plumb & Murray. The purpose of this process was to co-create a clear, concise, and unique brand for the firm, as well as to uncover key messages that will resonate with people in meaningful ways.

The following information captures the essence of Murray, Plumb & Murray's core identity. We will use this platform as the framework for creating brand strategy and tactics, developing stories, and communicating with target markets, including the media.

In a nutshell, this brand platform will serve as the foundation for all future marketing and communications efforts.

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Marketing Goals

Based on conversations with and feedback from Murray, Plumb & Murray, we identified four marketing goals that will help ensure our marketing efforts are purpose-driven:

- Articulate a strong, relevant, and distinctive brand identity
- Increase name recognition
- Build market presence and a thought leadership position
- Generate new business and leverage existing relationships

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Values/Personality

Key characteristics

- Caring, friendly, people-first, client-focused, good listeners
- Relentless, willing to go the extra mile, hard-working, ingenious, desire to win
- Uniquely independent firm supported by individual and collaborative strengths
- Unconventional, free thinkers
- Ethical, scrupulously honest and transparent (including about fees), we do the right thing

Secondary characteristics

- Humble (no egos)
- Responsive
- Professional with a dose of good humor
- Confident
- Detail-oriented, meticulous
- Camaraderie
- Respect
- Curious, life-time learners
- Greater good/community service
- Flexibility
- Smart/knowledgeable
- Loyal

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Strengths

Key strengths:

- Client relationships, client-centric approach
- Breadth of services delivered by attorneys at the top of their field
- Good communicators both with each other and clients – and in all aspect of client service (including costs/fees) and casework (oral and written arguments, etc.)
- Relentless effort to achieve client's desired outcome

Additional strengths:

- Internal collaboration (benefits the client)
- Competent
- Wisdom (beyond knowledge)
- Specialized
- Persistent, look harder, wrestle until solved
- Stay by clients side, don't abandoned cases, in it for the long haul
- Longevity of the staff
- Survivorship of the firm; defied the odds doing it our way
- Truly engaged
- Problem solvers, excel at the complex
- Quality work
- Community service
- Cost-effective (for out-of-state clients)
- Responsive
- Commitment to winning
- Quality product delivered consistently by people clients enjoy being around and could imagine hanging out with in a casual environment

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Brand platform

A brand statement is an internal tool that articulates the essence of the firm and lays the foundation for all marketing efforts. It includes the target audience, definition/category, and your key promise/benefit – followed by key messages or support points (how you deliver on this promise):

Brand statement

To businesses, entrepreneurs, and individuals with an interest in Maine, Murray, Plumb & Murray is the personable, responsive, and unorthodox mid-size law firm that goes beyond winning to deliver a meaningful legal experience that clients feel good about.

Key messages/support points (how you deliver on this promise):

1. We see and treat clients and each other as people first.
2. We are ingenious problem solvers who find joy in complexity and craft solutions through a collaborative environment.
3. We are relentless researchers and advocates put forth every effort to achieve our client's best interest and who leave no stone unturned, no case or client abandoned, and no opportunity to make a positive impact missed.

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Brand platform continued...

Key messages:

In building brand, it is important to define and consistently communicate key messages. These key messages should be communicated in all marketing efforts. Whether a lawyer is talking with a prospective client, doing a media interview, or giving a speech, these points should guide their communication about the firm.

1. *We see and treat clients and each other as people first.*

We are built on the founding principle of mutual respect for and support of colleagues and clients. The firm is our family and clients are our friends. We are deliberately small enough to be personal and nimble, yet large enough to have an impressive depth of talent/experience. We are vested in each other and our clients, always holding steadfastly to humanity first. We meet clients where they are, mirror them the best we can, and communicate upfront and openly. With us, there are no surprises (including about fees) and people can expect to feel well cared for.

Key words/concepts: Humanity. Relationships. Respect. Real. Vested.

2. *We are ingenious problem solvers who find joy in complexity and craft solutions through a collaborative environment.*

We are puzzle people who love a good challenge – and we’re good at it. We are not only willing but also eager to delve into the hard stuff – even taking on cases other law firms shy away from. We work independently to solve cases and collaborate when it makes sense. We find reward in the challenge and enjoy solving a case as much as winning it.

Key words/concepts: Ingenious. Willing. Solutions. Collaboration.

3. *We are relentless researchers and advocates put forth every effort to achieve our client’s best interest and who leave no stone unturned, no case or client abandoned, and no opportunity to make a positive impact missed.*

We are relentless in our pursuit to win on behalf of a client, succeed in what they hired us to do, and serve them well. We attack our work, do exhaustive research, work tireless hours, and care passionately about every case. There is no search and replace, no cookie cutter, no short cut, no quitting. And we’re always seeking ways to make a bigger impact by making good law, improving the system, and positively affecting the greater legal/local community.

Key words/concepts: Relentless pursuit. All in. True partner. Greater good.

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Closing

Now that we have uncovered Murray, Plumb & Murray's brand, it is time to begin to articulate and build it. This work is meaningless unless the brand is consistently integrated into all aspects of your communication and brought to life for current and potential clients, the media, and legal thought leaders, as well as for the people of Murray, Plumb & Murray.

The next step in our work together is story mining, where we will facilitate five 1-hour conversations in early June to mine for stories that reflect the brand and its key messages. We will then use this brand platform and our story bank as the building blocks for our brand action plan.

As we have shared, Murray, Plumb & Murray's lawyers and staff must commit to a strategic, proactive, and content-driven marketing campaign to help the firm move to the next level of performance and profitability. The good news is that we're underway.

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Story Bank

Background

Based on our story mining interviews, we discovered a variety of potential MPM story ideas/themes. In finalizing which stories to focus on this year, we kept in mind the following strategic considerations:

- Which stories best support your business goals?
- Which themes best articulate the key brand messages?
- What level of participation/access will clients allow?
- What's timely/relevant based on current events/news?
- Who is your audience?
- Local/regional or national?
- Consumer or trade?
- Channel of communication (media, blog, speech, etc.)?

These considerations, combined with insight from the brand facilitation, led us to the uber themes and supporting story ideas that we recommend in the following pages.

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Story Bank

1. Attorneys shaping the law they practice

This idea brings to life the concepts that MPM goes beyond winning. It especially touches on the third key message, which is about being relentless advocates who never miss an opportunity to make a positive impact.

MPM lawyers play a leadership role in setting precedent across several practice areas. This topic allows us to talk about the firm's wins, as well as its mindset/thinking. It is an opportunity to truly position MPM lawyers as thought leaders/change-makers.

Stories:

a. **Interpretation of outdated Maine property law**

Maine property laws are a patchwork of regulations often centuries old. MPM creative thinking has provided a modern interpretation for outdated laws, creating a winning solution for clients, helping the courts find new ways to settle disputes, and improving the law for those facing similar disputes.

Cases:

- i. Easement dispute vs. CEO of LL Bean
- ii. Reshaping zoning laws during 1980's building boom

b. **Precedence for expanded special education eligibility**

MPM fought and won a landmark case that expanded the eligibility of special education services to include children with functional/behavioral issues. Cited nationwide as the case that defines eligibility, it has opened the door for special education services for countless children.

Case: Mr. and Mrs. "I"

c. **Protecting consumers who are victims of identity theft**

Precedence giving consumers financial reward when their identity has been compromised.

Case: Hannaford

d. **Precedence for future cases working with Jehovah Witnesses**

Custody dispute involving a parent who was a Jehovah Witness and did not believe in blood transfusions. Lost the case but successful in advocacy in favor of the parent – both have rights.

Case: Jehovah Witness/Custody case.

e. **MPM Excellence**

The story of MPM leadership told through the accomplishments of the firm and its individual attorneys. From sharing professional and community recognition to celebrating big wins, each opportunity provides a chance to build brand recognition.

Example: Super Lawyers 2016 listing

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Story Bank

2. Attorneys helping people and businesses succeed

MPM is a firm of ingenious problem-solvers, helping individuals and businesses succeed in their personal and professional lives. This topic allows us to share the wealth of knowledge across all practice areas on issues of interest to current and potential MPM clients. In doing so, we showcase our depth of expertise and advocacy in areas where we focus.

Personal stories

a. **Special education strategies for parents**

When facing the bureaucracy and maze to secure special education services for their children, parents are hungry for reliable information to help them succeed. Based on years of successful cases and landmark decisions, MPM is in an ideal position to provide insight and guidance.

b. **A vacation home divided**

Maine has a rich history of residents and out-of-staters with second homes in the state. However, poor estate planning often leads to family disputes and dysfunction when a vacation retreat passes on to multiple family members. MPM can offer up ways for first-generation owners to proactively address this issue, as well as strategies for families already facing a house divided.

c. **Understanding property easements**

Easement disputes often rest upon very complex and dated laws. MPM can help demystify this issue for property owners and give them strategies for how to identify potential easement problems.

Business stories

a. **What's your exit strategy?**

Business owners and entrepreneurs looking to sell or transition their business are faced with lots of options – sell to a bigger company or competitor, transition ownership to family members, or even structure an ESOP. MPM can examine the benefits and limitations of the choices and help professionals refine their exit strategy.

b. **When a big client goes chapter 11**

How do you best position yourself to secure outstanding payments when a client files for bankruptcy? MPM shares some of the winning strategies it's used for subcontractors left in the red following a number of recent Maine paper mill bankruptcies.

c. **Leasing vs. purchasing:**

Whether you're an entrepreneur ready to make the leap into your first office space or a manufacturer ready for a new warehouse, there can be a lot of questions about whether leasing or purchasing is the best option. Based on its extensive client experience, MPM provides an overview and a checklist designed to help professionals understand what option is best for their business.

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Story Bank

3. Attorneys bringing social and legal issues home

There is an opportunity to connect with people in a personal, meaningful way – to help them understand how and why social and legal issues are relevant to them. The reality is social and legal issues do affect everyone, but at times people need help making sense of what can seem like distant, complicated issues. These themes position MPM lawyers as thought leaders and trustworthy allies.

Stories

a. The evolving landscape of the American workforce

Whether it's the changing face of the American worker, the impact of emerging technology, the complexity of regulation, the decline of unions, the demand for work/life balance, etc., the workplace and workplace looks nothing like it did even a decade ago. Companies are charged with getting their arms around these issues and having the foresight to adapt and grow accordingly if they want to survive and thrive in the future.

Cases:

- i. Abercrombie & Fitch/Muslim woman headscarf lawsuit
- ii. UPS: Weight lifting restriction/pregnant woman lawsuit
- iii. Trucking issues: safety/hour limitations/employee shortage/etc.
- iv. Verizon Strike
- v. Pay issues, sexual discrimination, wrongful termination, etc.

b. Criminal events and social issues

Our entire nation is affected by the criminal events and social issues that make headline news time and time again. MPM can help people understand how the consequences of these events and issues impact society, as well as what individuals and communities can do to be part of the solution.

Cases:

- i. Orlando shooting, Stanford/Vanderbilt rape cases, etc.
- ii. Supreme court cases (argued in September–October)
- iii. Discrimination, abortion, gun control, gay marriage, religious freedom, death penalty, confederate flag, airport security, etc.

c. Maine setting the stage for fairer elections with statewide ranked-choice voting on the ballot.

Progressive cities like San Francisco, Minneapolis, and Portland already use ranked-choice voting. This November, Mainers will decide whether Maine becomes the first state to implement statewide ranked-choice voting – a “simple change that can have a big impact” (fairvote.org).

d. Could eminent domain happen to me?

Representing the largest case of eminent domain in Maine (Portland Waterfront), MPM lawyers are in a special position to shed light on how landowners could be at the mercy of the government – and what they can and cannot do about it.

About the Firm



Our People

Practice Areas



News & Events

MP&M Blog

How Can We Help?

Murray Plumb & Murray has been serving the legal needs of the Portland, Maine and northern New England area for almost 40 years.

Select a practice area



*We believe in people first, ingenious problem solving,
and making a positive impact. Always.*

MURRAY PLUMB & MURRAY

ATTORNEYS AT LAW

WELCOMING OUR NEW PARTNER
STACEY D. NEUMANN

Stacey joined Murray Plumb & Murray in 2013, bringing an impressive background of experience. As a partner, she will continue to represent clients in the areas of criminal defense, employment discrimination, civil rights, and collegiate discipline and Title IX litigation.



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“WHAT I LOVE ABOUT REAL ESTATE LAW IS WORKING ON DEALS, AND THEN WALKING AROUND THE CITY, SEEING A BUILDING, AND THINKING, ‘I HELPED MAKE THAT HAPPEN.’”



DREW A. ANDERSON

Partner, Chair of Real Estate & Finance Practice Group

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main: 207.773.5651

DREW A. ANDERSON

Drew joined Murray Plumb & Murray in 1990 and today is a partner and the firm's Managing Director. Drew thrives on working with others to achieve a common goal, the diversity of his work, and putting clients at the center of everything he does. His tenure includes more than 25 years of experience in commercial real estate and corporate law. Underscoring all of his work is a steadfast commitment to service, relationships, and open communication. There's nothing Drew likes more than people asking, "Can you help me with this?" and responding with a resounding, "Yes."

Drew practices in a wide variety of real estate areas, including:

- the purchase, sale, and development of commercial and industrial buildings and multi-family apartment buildings and complexes
- leasing transactions for landlords and tenants
- representing lenders and borrowers in loan transactions of all types
- assisting developers with residential and office condominiums.

Drew's corporate work includes stock and asset purchases and sales, shareholder agreements, and formation of business entities in Maine and other jurisdictions, including limited liability companies. Drew also heads Murray Plumb & Murray's title services group, which provides title insurance products to real estate owners as agent for Old Republic National Title Insurance Company and First American Title Insurance Company. His achievements include being named to New England Super Lawyers and The Best Lawyers in America for Real Estate Law.

Drew currently serves as a Board Member of Geneva Point Center. He recently served on the Board of The Immigrant Legal Advocacy Project (ILAP) and is a former board member (and past president) of the Children's Museum of Maine and Portland's Downtown District. Drew lives with his family in Portland.

PRACTICE AREAS

- Real Estate and Finance
- Business & Corporate Law

EDUCATION

- Suffolk University Law School, J.D.
- Staff Member & Literary Editor, Suffolk University Law Review
- Boston College, B.A., cum laude

BAR & COURT ADMISSIONS

- Maine
- Massachusetts
- New York

MURRAY PLUMB & MURRAY
ATTORNEYS AT LAW

CREATING SUCCESSFUL OUTCOMES



Plus a whole lot more

Our lawyers appreciate how much goes into starting and running a business. And we're here for you every step of the way. Congratulations and a heartfelt thanks to all of the award honorees and recipients for the work you do – and for making Maine an even better place.

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PROTECTING WHAT MATTERS



We're in your corner

Our lawyers are relentless advocates, committed to helping you succeed in all aspects of life. You work hard to design the life you love – from nurturing your family, to creating your home, to building your business. Let us help protect and cultivate what's important to you.

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Marketing Communications Recommendation

November 7, 2016

Submitted by
A. Smith Consultancy

Murray Plumb & Murray

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Background

Murray Plumb & Murray has engaged in marketing activities in the past; however, the firm desires to take their efforts to the next level and participate in a more strategic, integrated, proactive, and content-driven approach to marketing – built on a strong, internally discovered and agreed upon brand platform.

Here is a bird's eye view of what we understand the goals to be, our approach, and the target audiences.

Program goals:

- Raise awareness of Murray Plumb & Murray and its practice areas
- Increase loyalty among, and referrals from, existing clients
- Drive consideration of Murray Plumb & Murray by potential clients
- Build goodwill among Maine communities, businesses, and people

Strategic approach:

- Promote the overall Murray Plumb & Murray brand, as well as individual practice areas
- Build thought leadership positioning for Murray Plumb & Murray using a combination of content development, media relations, social media, client cultivation, advertising, and interactive programs
- Leverage attorney expertise to support meaningful content development
- Use news and trends as a platform for Murray Plumb & Murray commentary

Target audiences:

- Murray Plumb & Murray attorneys and employees
- Current Murray Plumb & Murray clients
- Trade media covering the law and legal professionals
- Trade media covering Murray Plumb & Murray practice areas
- Media covering Murray Plumb & Murray service area
 - Portland, Maine, Northern New England
- Businesses and families with interests in Maine

Murray Plumb & Murray

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Messaging

The brand positioning and key messages, which we developed in collaboration with Murray Plumb & Murray, will serve as the foundation for our marketing communications program. Everything we do will reflect the overall brand to ensure we are creating clear, consistent, and meaningful communications that capture Murray Plumb & Murray's values and personality.

As we previously shared, the brand statement captures the essence of your brand – it is your promise. It differentiates your firm in the marketplace and communicates your value to clients.

BRAND STATEMENT

To businesses, entrepreneurs, and individuals with interests in Maine
Murray Plumb & Murray is the personable, responsive, and unorthodox mid-size law firm that goes beyond winning to deliver a meaningful legal experience that clients feel good about.

KEY MESSAGES

In building a brand, it is important to define key messages, which should be communicated in all marketing efforts. Whether a partner is talking with a prospective client, doing a media interview, or giving a speech, these points should guide their communication:

- *We see and treat clients and each other as people first.*
Key words/concepts: Humanity. Relationships. Respect. Real. Vested.
- *We are ingenious problem solvers who find joy in complexity and craft solutions through a collaborative environment.*
Key words/concepts: Ingenious. Willing. Solutions. Collaboration.
- *We are relentless researchers and advocates who put forth every effort to achieve our client's best interest and who leave no stone unturned, no case or client abandoned, and no opportunity to make a positive impact missed.*
Key words/concepts: Relentless pursuit. All in. True partner. Greater good.

TAGLINE

Murray Plumb & Murray...Helping Maine businesses and families succeed

Murray Plumb & Murray

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Content strategy

APPROACH

Our marketing communications program for Murray Plumb & Murray leverages a variety of content to tell the firm's story and create a dialog with current and potential clients, as well as the media. The content strategy is supported by a number of tactical elements detailed in this plan which, when executed in a coordinated and proactive manner, can build awareness and preference for Murray Plumb & Murray.

CONTENT CALENDAR

This tool will help us forecast and track execution of the various tactical elements that support the content strategy and the overall marketing communications program. The content calendar serves as a dashboard that includes the following program elements:

- Blog postings
- Press releases
- Bylined articles/Op-Ed pieces
- Social media posts: LinkedIn and Facebook
- Newsletter

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2017 Content Calendar

Month	Blogs	Press Releases	Bylined Articles/Op-Eds	Social Media
October 2016				
Weeks 1&2	Ranked Choice Voting: Tim Boulette 10/7			
Weeks 2&3		Scarborough tax abatement case: posted to MPMLaw.com 11/2		
November 2016				
Weeks 1&2	Supreme Court: Stacy Neumann	MPM attorneys named to SuperLawyers: 11/2 distributed and posted to MPMLaw.com		Update MPM LinkedIn and Facebook pages and begin posting blogs, press releases and media coverage to these sites
Weeks 2&3	MPM launches TV campaign			
December 2016				
Weeks 1&2	Scarborough tax abatement decision	Scarborough tax abatement decision		
Weeks 2&3	Family Property: Amy Phalon & Rachael Sears			

Captured above is the October – December 2016 Murray Plumb & Murray Content Calendar listings to date. Working with Murray Plumb & Murray, we will identify blog topics, as well as traditional and social media opportunities to build out remaining 2016 opportunities and begin development of 2017. We'll also use Story Bank themes, news and current event topics, speaking opportunities, and other program elements to feed the content strategy and calendar throughout the program.

Murray Plumb & Murray

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Media relations & thought leadership

Media relations provides the opportunity to establish and maintain ongoing, positive relationships with the press with the goal of sharing stories in a way that makes it easy for the press, in turn, to share Murray Plumb & Murray stories with their audiences.

CHARACTERISTICS OF A SUCCESSFUL MEDIA RELATIONS PROGRAM:

Proactive. Setting the course is vital. It increases the likelihood of coverage and offers more control over the message and content.

Strategic. With every media opportunity, we consider how it supports the goals to build loyalty, awareness, and business.

Targeted. Our efforts will focus on key media and relevant editorial opportunities that let us to communicate the Murray Plumb & Murray message to our target audience.

Clear. Quality, concise writing is critical. Skip the jargon. Keep on point.

Newsworthy. Quality, not quantity is what matters. Build credibility by communicating information only when and if it is worthwhile.

Responsive. Meet the needs – and the deadlines – of the media.

Honest. Forget spin. Be authentic.

OUR APPROACH TO MEDIA RELATIONS

Our media relations program will:

- Respond to news as it happens
- Provide commentary/perspective on relevant news and trends
- Proactively pitch stories based on our (evolving) content calendar and various media's editorial calendars
- Develop and pitch content based on story mining themes and seasonal topics

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TACTICAL EXECUTION

Media pitches

We will develop and pitch stories to influential consumer, business, trade, and legal media throughout Maine and New England. In some cases, we might also explore very targeted national outlets to continue building exposure of Murray Plumb & Murray.

As part of this plan, we've developed (are developing) two 1-page pitch outlines:

- Scarborough tax abatement story (John Shumadine)
- Outlook for the Supreme Court's new term OR issues/cases to watch as the U.S. Supreme court starts arguing new cases in October/November (Stacey Neumann)

Press releases

Press releases are one way to share news with the media. Potential press release topics include:

- Company/individual awards and recognition (i.e. SuperLawyers)
- Client wins (i.e. Scarborough tax abatement win)
- New hires

As importantly, press releases should be repurposed as part of our content strategy. They can be posted on MPMLaw.com as well as to your LinkedIn and Facebook pages to increase reach and SEO. They also can provide the foundation for a blog post.

Bylined articles and editorial pieces

Bylined articles are typically written for trade journals, magazines, or business publications and can help establish professionals as thought leaders in their industry/community. The purpose of these articles is to share expertise/knowledge and, thereby, distinguish the contributor. Bylined articles might offer perspective on a new law, shed light on an issue and offer a solution, share a lesson learned, provide how-to information, etc.

Op-ed pieces give attorneys a platform for sharing their opinion and ideas. While an op-ed should not be blatantly promotional, it does communicate the writer's personal opinion. Op-ed pieces should be written for the general public. Timing is essential in writing/pitching editorials as it's best to tie them directly with something happening in the news.

We will:

- Identify/pitch relevant opportunities for Murray Plumb & Murray to contribute articles to key media outlets
- Work to repurpose existing content for this purpose
- Develop new copy/content, as needed

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Interview opportunities

We will position Murray Plumb & Murray attorneys as media sources who can offer their expertise, insight, commentary, information, etc., to reporters/editors. Securing media interviews will be especially important in cultivating news about Murray Plumb & Murray wins/cases and reacting to news in the making. Support of interview opportunities will include:

- Assessment and response to requests for interviews
- Preparation of Murray Plumb & Murray representatives for interviews
- Staffing of interviews, as needed
- Media follow-up after interview

Awards and recognition

We will identify and present for consideration any relevant media-sponsored awards and recognition, ranging from local opportunities (i.e. MaineBiz 40 under 40) to national ones (i.e. Super Lawyers).

Case studies & testimonials

Strategic development of case studies and testimonial quotes that specifically support and promote key Murray Plumb & Murray brand and key messages.

- Goal of creating four case studies in 2017
 - Work with Murray Plumb & Murray team to ID clients/projects to profile and timing
 - Final case study to be posted on MPMLaw.com and distributed via Murray Plumb & Murray social media
 - Create a blog post that summarizes case study and links to the full content
 - Case studies can also be pitched to select media for inclusion/coverage and/or expansion into more detailed case study/feature
- On a regular basis, ID and confirm client testimonial “quotes.”
 - Reliance on Murray Plumb & Murray attorneys to ID these opportunities and get client OK to use them on
 - Integrate into Murray Plumb & Murray Web site, press materials, bylined articles, etc.

Electronic newsletter

We will collaborate with Murray Plumb & Murray to continue (restart) its quarterly newsletter – contributing content and feedback, as appropriate.

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TOOLS

Press kit

A well-written, informative press kit is an essential ingredient to a proactive media relations campaign. We've developed a press kit that positions Murray Plumb & Murray as an accessible, knowledgeable, and prepared resource to the media. Having information written and readily available will also better position Murray Plumb & Murray to help shape the message/story. The press kit includes:

- Firm overview
- Bios—Final, pending review, waiting to connect for input (Appendix)

Media list

We've compiled a targeted media list for Murray Plumb & Murray that includes local and regional newspapers, magazines, trade publications, radio, television, and online outlets. As the program grows, we will continue to develop relationships with these editors/reporters – and others, as appropriate.

- | | |
|---|---|
| 1. <i>ABA Journal</i> | 18. <i>Sun Journal</i> |
| 2. <i>ABI Journal (American Bankruptcy Inst.)</i> | 19. <i>Times Record</i> |
| 3. <i>AP Maine</i> | 20. <i>WCSH-TV</i> |
| 4. <i>Bangor Daily News</i> | 21. <i>WGME-TV</i> |
| 5. <i>Biddeford Courier Coastal Journal</i> | 22. <i>WMTW-TV</i> |
| 6. <i>Cumberland Bar Association</i> | 23. <i>NECN-TV</i> |
| 7. <i>The Forecaster (4 editions)</i> | 24. <i>Maine Association of Trial Lawyers</i> |
| 8. <i>Kennebunk Post</i> | 25. <i>Maine Bar Journal</i> |
| 9. <i>Mainebiz</i> | 26. <i>Maine Lawyers Review</i> |
| 10. <i>Maine Bar Journal (ME Bar Assoc.)</i> | 27. <i>Maine Law Review</i> |
| 11. <i>Maine Startups Insider</i> | 28. <i>Maine Motor Transport Newsletter</i> |
| 12. <i>Mainely Media</i> | 29. <i>Maine Real Estate Insider (MEREDA)</i> |
| 13. <i>MPBN</i> | 30. <i>MMTA News Magazine</i> |
| 14. <i>Portland Press Herald</i> | 31. <i>NH Bar News (NH Bar Assoc.)</i> |
| 15. <i>Portland Chamber of Commerce</i> | 32. <i>Ocean & Coastal Law Review</i> |
| 16. <i>Scarborough Leader</i> | 33. <i>The Federal Lawyer (Fed. Bar Assoc.)</i> |
| 17. <i>South Portland/Cape Elizabeth Sentry</i> | |

The complete media list is included in the addendum.

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Social media

APPROACH

A focused, strategic approach to social media can be a powerful way for Murray Plumb & Murray to build your brand and increase awareness. Our approach is to leverage the expertise at the firm to create consistent, content-rich blogs that can be posted on MPMLaw.com and repurposed almost effortlessly on your LinkedIn and Facebook pages. We'll also use the same approach to extend the reach of news coverage, press releases, advertising, and other materials generated by the marketing communications program.

PROGRAMS

Murray Plumb & Murray Blog

- Create blog section on Murray Plumb & Murray website
- Goal of creating and posting two blog posts per month, 250+ words – that's only 2 blog posts per attorney for the year
- Whenever possible, repurpose/edit press releases, news coverage, case studies, CLE presentations, newsletter articles, and other materials to create content for blog posts
- Over time, ability to invite others to post a guest blog and/or for Murray Plumb & Murray to be a guest blogger on other sites

Murray Plumb & Murray LinkedIn

- Update the copy and look/feel of the Murray Plumb & Murray LinkedIn page to reflect the new brand positioning
- Post links to blogs, press releases, news coverage, and all other relevant content generated by the marketing communications program

Murray Plumb & Murray Facebook

- Update the copy and look/feel of the Murray Plumb & Murray Facebook page to reflect the new brand positioning
- Post links to blogs, press releases, news coverage, and all other relevant content generated by the marketing communications program

TOOLS

Content Management Tool

- Work with Murray Plumb & Murray to set up free access to an online content management tool, such as Hootsuite or TwitterDeck, that can be used to schedule and post items to LinkedIn, Facebook, and other social media sites
- Scheduling and management of posts can be handled internally at Murray Plumb & Murray, by Angela and Karla, or a combination of the two

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Brand Discovery

Client cultivation: networking, sponsorship, & speaking opportunities

When it comes down to it, marketing is about connection – about building a brand community. Toward this end, we will collaborate with Murray Plumb & Murray to map out the organizations that are at the epicenter of existing conversation and forward thinking related to law, leadership, and practice areas – and explore ways for Murray Plumb & Murray attorneys to engage and connect. Although we reference this as “client cultivation,” it includes not only current and prospective clients but also referring sources.

APPROACH

Client cultivation can help put Murray Plumb & Murray on the map, raise awareness among current and potential clients and referral sources, and position attorneys as thought leaders in the community. It’s important to recognize, however, that this requires real commitment. The firm needs to understand and be willing to put forth not only dollars but also human capital.

In exploring networking, sponsorship, and speaking opportunities, we will:

- 1. Consider opportunities that work in tandem and/or independently.**
At times, it may make sense to explore multiple opportunities with the same organization/event. For example, the firm may benefit from attending (networking), sponsoring, and speaking at an event like Maine Startup and Create Week. Other times, a simple sponsorship may be enough. For example, an ad in the Portland Symphony Orchestra playbill.
- 2. Build from the ground up – understanding client cultivation is often a series of progressive steps.**
Although networking, sponsoring, and speaking have a fluid relationship, networking and sponsoring opportunities frequently precede speaking opportunities. Simply stated you have to “pay your dues” in terms of engagement over time – and sometimes literally “pay to play.”
- 3. Start small/local and grow the firm’s presence.**
You will need to start local/small and grow from there. You have to build a presence. You cannot expect to instantly engage at big events and/or at the national/New England level. It’s better to start right here in Portland and expand your presence and level of involvement over time.
- 4. Weigh opportunities that benefit the firm overall, as well as ones promote individual practice groups and/or personal interests.**
There will be firm wide client cultivation complemented by targeted efforts among attorneys/practice groups.
- 5. Work with Murray Plumb & Murray to develop a budget to support client cultivation.**
Our recommendation is to have a firm-wide budget to support networking, sponsorships, and speaking opportunities that benefit the firm at large (perhaps funds previously earmarked for the Martendale-Hubbell directory).

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TOP 10 CLIENT CULTIVATION OPPORTUNITIES

Event	Description	2017 Recommendations: Membership, Networking, Sponsorship, Speaking, Awards
Mainebiz Momentum Convention	Maine's largest business-to-business and networking event, attracts 1,500+ business professionals	TBD
Maine Startup & Create Week	Celebrates entrepreneurship, cultivates creativity, and drives high-impact innovation.	TBD
Maine Center for Entrepreneurial Development	Helps entrepreneurs re-invent the Maine economy by providing resources to build innovative world-class companies.	TBD
Maine Real Estate & Development Assoc.*	Promotes an environment for responsible development and ownership of real estate throughout Maine.	TBD
Institute for Family-Owned Business	Dedicated to the success of family-owned businesses in ME.	TBD
World Affairs Council of Maine	Connects Maine and the world by engaging and educating people of all ages to become global citizens.	TBD
PubHub	Monthly gathering of Maine's entrepreneurs, from one-woman startups to product managers at the largest companies.	TBD
Maine Motor Transport Association*	Actively seeks ways to positively impact highway safety and provide leadership on issues that impact Maine's future.	TBD
Strategic HR/Maine HR Convention	Helps companies foster healthy relations with their employees, thereby avoiding costly workplace conflict and litigation and allowing them to focus their energy on their products and services.	TBD
Portland Regional Chamber of Commerce*	Supports individual, community, and business growth by offering advocacy, educational opportunities, and valuable networking, as well as other benefits to promote regional prosperity.	TBD

NEXT STEPS

Client cultivation is a work in progress, and we are still in the exploratory phase. Next, we will request feedback and budget parameters from Murray Plumb & Murray. Then, we will further research opportunities and make specific recommendations for 2017.

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In addition to researching opportunities with the top 10, we will consider engaging with other organizations including (*Denotes current membership):

2 Degrees Portland	Maine House of Genius
American Bar Association*	Maine Housing
Autism Society of Maine*	Maine Humanities Council
Coastal Enterprises	Maine Real Estate & Dev Assoc.*
Creative Portland	Maine State Bar Association
Cynergy	Maine Technology
E2Tech	Maine Trial Lawyers Assoc.*
Entrepreneurs Connect	Maine Women's Fund
Environmental Business Council of New England	New England Brew Summit
Federal Bar Association*	New England Lawyers Association*
Green Drinks	New England Legal Foundation
Greenlight Maine	New Hampshire Bar Assoc.*
GrowSmart Maine	New York State Bar Assoc.*
Husson University—Smart Business Series	New Ventures
Immigrant Legal Advocacy Project	On the Road with MaineBiz
Import Forum (Maine International Trade Center)	Peloton Labs
Justice Action Group	Pine Tree Legal Services
Maine Accelerates Growth Initiative	Pitch-off
Maine Affordable Housing Coalition*	Portland Symphony Orchestra
Maine Angels	Portland Trails
Maine Association of Criminal Defense* Lawyers*	Propel
Maine Association of Mediators*	Realize Maine Network
Maine Banker's Association	SCORE Portland Maine
Maine Bar Association*	Small Business Maine (SMBME)
Maine Bar Employment Section	TechMaine
Maine Community Foundation	TEDxDirigo
Maine Development Foundation	Telecommunications Association of Maine*
Maine Education Lawyers Assoc.*	United Way of Greater Portland
Maine Employment Law Center	UM School of Law
Maine Entrepreneurial Center at SMCC	USM Center for Entrepreneurship
Maine's Environmental Sustainability Network	Women's Business Center at CEI
	Women Standing Together
	Women's Success Summit
	Work It

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Advertising

Traditionally, Murray Plumb & Murray has taken a fairly ad hoc approach to paid advertising. For the 4th quarter 2016, we're able to explore new ground with a focused TV ad campaign outlined below. For 2017, we will work with our media planner to develop a proactive and strategic recommendation for advertising based on the budget guidelines provided by Murray Plumb & Murray.

APPROACH — TV AD

Our approach to a Murray Plumb & Murray TV ad is to highlight the *individual stories of the people* who make Murray Plumb & Murray special and truly bring the brand to life. We aren't relying on resumes and headshots in front of law books — these fail to convey the uniqueness of Murray Plumb & Murray and are not compelling to viewers at home.

Instead, we're using personal stories and business anecdotes from specifically chosen lawyers (representing different practice areas, backgrounds, hometowns, tenure, gender, etc.) whose individual stories speak volumes about the collective culture of the firm.

PROGRAMS

Television ad schedule

We're producing two different :15 spots and will rotate them throughout our six-week advertising campaign running on WGME-TV (13), the CBS affiliate station in Portland. The campaign will air November 9 – December 18, 2016, airing a total of 78 ads, or 13 spots/week. The schedule below focuses on news programs, as well as the popular CBS Saturday and Sunday morning shows and Face the Nation, which reach a mature, professional demographic, with the weekend programming also skewing more affluent.

Program	Daypart	Spots/Week	Cost/Spot	Weekly Cost
Good Day Maine	M-F/6am-7am	3x	\$100.00	\$300.00
News 13 at Noon	M-F/ 12n-12:30pm	4x	\$50.00	\$200.00
News 13 @ 6pm	M-F/6-7pm	2x	\$230.00	\$460.00
CBS Saturday Morning	Saturday 8am-10am	1x	\$50.00	\$50.00
CBS Sunday Morning	Sunday 9am-10:30am	1x	\$180.00	\$180.00
Face the Nation	Sunday 1030am - 11:30am	2x	\$50.00	\$100.00

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2017 Media Plan & Sponsorship Recommendation

For 2017, we will develop a recommendation that considers a mix of paid advertising, including TV, print, online, and/or radio, as well as paid sponsorship opportunities. We will look to Murray Plumb & Murray to provide budget guidelines for this recommendation, and our plan is to present a recommendation in early December so we have a final approved plan in place to begin 2017.

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Web Presence: MPMLaw.com

The Murray Plumb & Murray website is the primary way many potential clients, as well as attorneys seeking to make a referral, will learn about the firm. And, our content-focused program is designed to increase traffic to your website as well as increase your appearance when people conduct searches for legal assistance. As such, it's imperative that MPMLaw.com reflects the new brand and presents a compelling story.

APPROACH

In 2016, we made/are making the following updates to the current MPMLaw.com website.

- Redesigned and updated navigation bar
- Updated copy on home and about pages
- Added Employment law page; fixed Criminal Defense and Estate Planning pages
- Added blog page
- Moved address/directions to contact page
- Updating, redesigning bios
- Adding TV ads

NEXT STEPS

In 2017, we will redo the Murray Plumb & Murray website and will provide a separate estimate for this work. Deliverables will include:

- Strategy and project management
- Detailed site map
- Design concepts and layouts for home page, sub pages, including recommended images
- Copywriting for all pages
- WordPress setup and programming
- Responsive theming of the website using approved layouts provided
- Content migration
- Basic SEO such as
 - IMG alt/title tags as appropriate
 - Optimized page titles and descriptions
 - XML sitemap for submission to Google
 - Redirects from old site to corresponding pages on the new site
- News/Blog

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Program measurement

MEASURING SUCCESS

To help ensure marketing is appreciated as an investment rather than an expense, we will measure success through multiple channels. While “brand equity” is a real and powerful asset, it remains difficult to measure. Understanding this challenge, we recommend using a variety of measurements such as:

- Paid media (advertising) impressions
- Media inquiries
- Press clippings, media impressions, content analysis
- Earned media (Advertising Value Equivalent)
- Call volume (consider a separate number for ads for measurement purposes)
- Website traffic
- Blog traffic, comments, etc.
- Social media likes, favorites, mentions, shares, followers, etc.
- Number of speaking opportunities in a year

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PROGRAM SCOPE AND BUDGET

2017 Program Retainer: \$2,500/month for a total of \$30,000/year

The program will be managed based on an estimated 25 hours/month of strategic and tactical support throughout 2017.

Murray Plumb & Murray will prioritize activities, with input from A. Smith Consultancy, when/if work is likely to exceed the 25-hour monthly retainer. In these events, we will work closely together to identify what work can be accomplished under the retainer and/or a new scope of work beyond the retainer.

The following activities are included as part of the retainer for the ongoing marketing program:

- Client calls and meetings, as needed
- Monthly status reports (see Appendix for sample)
- Support ongoing thought leadership efforts, including media relations, social media, and client cultivation as outlined in this recommendation

The following programs will be developed and managed under separate budgets:

- Paid media advertising
- Memberships, sponsorships, speaking opportunities, etc.
- New website
- Ongoing design/creative services, as needed
- Photography, printing, and other out of pocket expenses

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Murray Plumb & Murray overview

We believe in people first, ingenious problem solving, and making a positive impact.

Our story

More than four decades ago, three Maine attorneys joined together and took the less-traveled road. They left the safety and comfort of big firms to do something that felt like a better fit for them and provided a greater service to clients. They started a smaller, slightly unorthodox firm with humanity at its core.

We see each other and clients as people first. Respectful, genuine relationships rooted in upfront, open communication are the linchpin of every legal endeavor we pursue. We are steadfastly committed to helping businesses, entrepreneurs, families, and individuals with ties to Maine succeed in their personal and professional lives. From education and business law to real estate and employment matters, our ingenious attorneys and practice groups are eager to delve into and solve complex issues.

Advocating for clients

Our lawyers are relentless in their effort to succeed for our clients. We attack our work, do exhaustive research, and care passionately about every case. We're always seeking ways to make a bigger impact by making good law, improving the legal system, and positively affecting the greater legal and local communities.

Every case, every detail, and every person matters to us. And, we have a solid track record to show for our efforts – from precedent-setting cases in special education eligibility and trucking industry safety regulations to resolving small business and personal issues.

Clients looking for a friendlier, more nimble and entrepreneurial approach to successfully addressing their legal issues, will find what they are looking for with us.

Beyond winning

Most lawyers see winning as the end game. We see it as a vital piece of the bigger picture. We're here to get the results clients want and deliver a meaningful legal experience that they feel good about. As a mid-sized New England law firm founded by lawyers who dared to be different, we are here to help people and businesses succeed. It's as simple as that.

Practice areas

Business & Corporate
Business Reorganization
Construction
Criminal Defense
Education

Employment
Environmental & Land Use
Estate Planning & Probate
Intellectual Property,
Media, & Technology

Litigation & Trial
Public Utilities
Real Estate & Finance

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Murray Plumb & Murray sample press release

Property Owners Score Legal Victory with Help from Murray, Plumb & Murray in Scarborough Property Tax Abatement Case.

Murray Plumb & Murray attorney John B. Shumadine, Esq. represents 34 residents of Scarborough, Maine, in a case challenging the town's practice of giving property tax breaks to some homeowners for adjacent lots that they own. On August 16, 2016, the Maine Supreme Judicial Court found that this practice is both illegal and discriminatory.

"The town gave substantial discounts worth tens of thousands of dollars to people solely because they owned more than one lot," said Shumadine. "The Maine Supreme Court agreed with our argument that the town had no basis for granting those discounts and discriminated against our clients."

The appellants had unsuccessfully sought abatements from the Town Assessor and the Scarborough Board of Review in 2013. Shumadine represented the group when they filed a 2014 complaint with the Superior Court (Cumberland County) in which the court concluded they did not have standing to seek remedial relief. He went on to appeal that decision to the Maine Supreme Judicial Court.

Maine State law does allow contiguously owned property to be combined for assessment purposes. However, the law does not allow combined property to be assessed below market value. In their finding, the Maine Supreme Court justices noted, "Maine law does not permit the town to engage in the fiction of treating separate smaller abutting lots as if they were a single larger lot, which results in an assessment that does not reflect just value."

The recent win paves the way for the property owners to seek property tax rebates from the town for four years of unjust property tax assessments made in 2012 to 2015. Shumadine will present an argument outlining what kind of abatement the homeowners are entitled to at a November hearing before the Scarborough Assessment Board.

Maine law firm Murray Plumb & Murray has helped individuals, entrepreneurs, and businesses successfully navigate legal issues since 1973. Attorneys at this mid-sized firm are known as relentless client advocates who go beyond winning to help shape the law they practice and improve the community they serve. The firm's practice areas include: Business and Corporate; Business Reorganization; Construction; Criminal Defense; Education; Employment; Environmental and Land Use; Estate Planning and Probate; Intellectual Property, Media and Technology; Litigation and Trial; Public Utilities; and Real Estate and Finance.

#

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Addendum: Media Pitch I

Story concept:

Murray Plumb & Murray scores legal victory for Scarborough property owners

Slug:

The Maine Judicial Supreme Court finds that Scarborough tax abatement practice is illegal and discriminatory.

Key topics/summary:

- Court finds that Scarborough's practice of giving tax breaks to homeowners for adjacent lots they own is illegal
- Decision reverses 2014 finding from the Superior Court (Cumberland County)
- Murray Plumb & Murray has represented 34 residents since 2014 in their fight against the town giving property tax breaks to some seaside homeowners for adjacent lots
- Decision lays groundwork for abatements to appellants for taxes paid 2012-2015

Themes/Cases:

- Attorneys helping people and businesses succeed
- Attorneys shaping the law they practice
- Appeal to the Maine Judicial Supreme Court
- Superior Court (Cumberland County) complaint

Distribution channels:

- Media pitch: Media covering Scarborough

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Addendum: Media Pitch II — in process

We will work with Stacey Neumann to develop a story pitch around the following concepts for this month.

Story ideas:

- Outlook for the Supreme Court's new term
- The issues and cases to watch as the U.S. Supreme court starts announcing and arguing new cases in October.

Key topics/summary:

- What are the key legal and social themes for the new session
- Court still short a justice – how does that impact the process
- Potential impact of election on court
- https://www.supremecourt.gov/oral_arguments/calendars/MonthlyArgumentCalOctober2016.html
- https://www.supremecourt.gov/oral_arguments/calendars/MonthlyArgumentCalendar2016.html

Stories

- Lynch v. Morales Santana Case: Gender at the Heart of Supreme Court Citizenship Case
- Etc.

Distribution channels:

- Media pitch: TV news interview

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Addendum: Blogging tips

Goal: Biweekly blog post (every other week) on the MPM website, beginning in October with each attorney responsible for submitting two posts annually.

Deadline: We are requesting each attorney to submit his/her first blog to Drew Anderson by **Wednesday, October 5, 2016.**

Why blog?

- Effective (and free) way to reach your target market and engage users.
- Builds credibility and helps build your reputation
- Helps build trust
- More content + frequent web updates = better SEO (search engine optimization) – in other words, helps drive traffic to your website.
- Opportunity to promote MPM as a whole, as well as cross sell and highlight individual practices
- Provides content for social media platforms, such as LinkedIn and Facebook

Quick blogging tips:

1. Keep it short: Brevity is best. This goes for the blog overall and each sentence. We recommend 250-400 words for a typical blog. That said, most of the examples we found for legal blogs include longer examples. For longer blog, use descriptive headers and bulleted lists to help increase ability for reader to scan. Also, be sure to put important points (or a summary) at the top -- don't expect any but the most invested reader to go all the way thru.
2. Be human/write the way you speak/avoid jargon: Keep in mind your main audience is not other attorneys – it's current and/or potential clients.
Write for fifth graders.
3. Write using an inverted pyramid style: Grab readers upfront and put the important stuff first. Get to the point.
4. Visuals are good: Use photos, charts, infographs, subheads, bullets, etc., to balance text and drive home key points.
5. Readers love lists: Ex. Top five things to keep in mind when renting a commercial space, three top supreme court stories of the year, etc.
6. Provides content for media platforms, such as LinkedIn, Facebook, and Twitter.

A few sample legal blogs/sources:

- <http://www.maineemploymentlawyerblog.com>
- <http://lukerious.com/maine-criminal-defense-lawyer-blog>
- <http://www.clarkandhowell.com/blog/>
- <http://specialledlaw.blogs.com/home/>
- <http://www.nutter.com/blogs/>
- <http://contentmarketinginstitute.com/?s=legal%20blogs>

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Possible blog topics to consider:

*****Note: Please submit your blog topic to Drew before you begin writing.**

3 Questions to ask at your child's IEP meeting

September is back-to-school and parents may be involved in securing or updating IEPs for their kids – this blog post offers some tips to help parents get the most out of those meetings.

When your biggest customer files for Chapter 11

What's your strategy when a big customer files for bankruptcy and you're left trying to get payment on outstanding invoices?

Ranked-choice voting and why it matters

In November, Mainers will decide whether we become the first state to implement statewide ranked-choice voting.

Maine perspective on U.S. Supreme Court arguments

The U.S. Supreme Court will be arguing cases in the fall – this blog post will take a look at a couple and their potential impact on Maine businesses/residents.

Succession planning for a family business

Practical tips and strategies for business owners interested in keeping it “in the family” when they retire.

Antiquated Maine property laws still on the books

A perhaps humorous look at a handful of old Maine property laws that are still on the books.

Advocating for a disabled family member

Provide some high-level strategies and resources for Maine people who care for a loved one with disabilities. (This could be a series of blog posts that run into 2017)

Family vacation home, LLC

A blog post that examines how the formation of a family LLC to manage a vacation home can reduce the stress of multi-generational property ownership and use.

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Sample blog — Timothy H. Boulette

Ranked Choice Voting and What It Means

This November, Mainers will have the opportunity to vote whether to adopt what is known as “ranked choice voting.” Question 5 on the ballot reads as follows:

“Do you want to allow voters to rank their choices of candidates in elections for U.S. Senate, Congress, Governor, State Senate, and State Representative, and to have ballots counted at the state level in multiple rounds in which last-place candidates are eliminated until a candidate wins by majority?”

If adopted by Maine voters, this new law would, in theory, prevent a situation in which a candidate wins a state election with less than a majority of the vote. For example, recent elections for governor resulted in the winner becoming the governor with less than 50% support.

Consider the following scenario: In a three-way race for U.S. Senator from Maine, the votes are as follows:

Candidate A	45%
Candidate B	43%
Candidate C	12%

Under existing Maine law, a bare plurality of votes is all that is required to win an election, and Candidate A would be deemed the winner. However, among voters for Candidate C, let’s say the strong majority prefers Candidate B over Candidate A. In other words, but for Candidate C being in the race, in all likelihood Candidate B would have won the election.

Ranked choice voting takes this into account by eliminating the last place finisher, looking at the second choices of the voters who voted for the eliminated candidate, and reallocating their votes to the remaining candidates. For example, let’s assume that of the 12% of votes for Candidate C, 75% of them (9% of the overall vote) would prefer Candidate B over Candidate A, with the remainder preferring Candidate A (3% of the overall vote). Expanding on our previous scenario:

Rank:	1	2
Candidate A	45%	3%
Candidate B	43%	9%
Candidate C	12%	

With ranked choice voting, Candidate B would be declared the winner with 52% of the vote, having picked up another 9% after Candidate C was eliminated.

Whether you find this ballot question particularly urgent may depend on whom you supported in the last gubernatorial election. Whichever way you choose to vote on Question 5, remember, it works both ways!

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Sample blog — Stacey D. Neumann

Parental Gender at Heart of Supreme Court Citizenship Case

The question the Supreme Court will consider on November 9, 2016, is whether it is a violation of the United States Constitution for the citizenship of a child born to unmarried parents to differ based on the gender of a parent. As it stands now, U.S. law makes it more difficult for children of U.S. citizen fathers than children of U.S. citizen mothers to obtain derivative citizenship when the child is born abroad. The Supreme Court will decide whether this is constitutional.

If the Court upholds the Second Circuit decision in favor of equal protection for children of citizen fathers, it could result in citizenship for thousands of individuals born abroad to U.S. citizen fathers, and may provide remedies to individuals currently facing deportation.

Case Overview: Lynch v. Morales-Santana, 15-1191

Luis Ramon Morales-Santana was born in 1962 in the Dominican Republic. His parents were unmarried, although married 8 years later. His father was an American citizen and his mother a Dominican Republic citizen. The law at the time stated a child born abroad to an unwed American citizen father and noncitizen mother only had citizenship at birth if the citizen father was physically present in the United States (or one of its possessions) for more than 10 years at some point prior to the child's birth—and at least 5 of these years had to be after the citizen father was 14 years old.

Morales-Santana's father was in Puerto Rico until 20 *days* before his 19th birthday (20 *days* short of the 10-year requirement that would have automatically conferred citizenship to Morales-Santana at birth). Because of this 20-day gap, Morales-Santana's father didn't meet the requirements to automatically give Morales-Santana U.S. citizenship upon birth. When Morales-Santana's parents married 8 years later, Morales-Santana was "legitimated" by his father's citizenship—but not enough to obtain full citizenship because of the law described above. Morales-Santana did become a "lawful permanent resident" at the time of his parent's marriage, but this status significantly limits rights compared to full citizenship.

In 2000, Morales-Santana was placed in "removal proceedings" (proceedings to "remove" the noncitizen individual from the U.S.) because he had been convicted of various felonies. At that point, Morales-Santana argued to the Immigration Officer that he should not be removed because he had derivative citizenship from his father.

Morales-Santana argued that the derivative-citizenship law in effect for unwed parents violated the Equal Protection Clause of the Fifth Amendment. **In other words—if Morales-Santana's mother had been the U.S. citizen and not his father, he would have been a citizen at birth and not removable. Morales-Santana said this difference based solely on the gender of his citizen parent was unconstitutional.** (There were requirements for physical presence for unwed citizen mothers, but they only required the mother's actual presence in the United States for one year

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at any point prior to the child's birth. Morales-Santana's father met that less-stringent requirement).

The Bureau of Immigration Appeals did not agree with Morales-Santana's argument and continued to try to remove him from the U.S. Morales-Santana appealed to the United States Court of Appeals for the Second Circuit. That Court reversed the Bureau of Immigration Appeals and held the gender-based difference in the physical presence requirement did violate the Equal Protection Clause of the Fifth Amendment. The Court then granted Morales-Santana citizenship. The United States (through Attorney General Loretta Lynch) appealed that decision to the United States Supreme Court. Oral Argument will be heard on the case on November 9.

The Court now has two questions to decide: 1) the Equal Protection Argument described above and 2) whether the *Court of Appeals for the Second Circuit* can actually grant U.S. citizenship to Morales-Santana, when there is no *statute* allowing this.

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Addendum: client cultivation — Top 10 opportunities (will outline all 10)

1. MaineBiz Momentum Convention—

What: Maine's largest business-to-business event and network.
When: Wednesday, November 9, 2016
Where: August Civic Center
URL: <http://www.mainebiz.biz/section/&template=moco>

Networking:

Spend the day more than 100 B2B companies and 1,500 business people. Kickoff breakfast, exhibit floor and business lounge, networking lunch, and end-of-day reception.

Sponsorship opportunities:

Presenting, MaineBiz U, Business Office Lounge, Networking, and Supporting sponsor

Call for speakers:

Expert speakers are needed to address: remote workers and telecommuting; millennium worker needs; data security; social media, marketing and customer reviews; investing in Maine; global marketplace; new face of retail (bricks and mortar vs. online); and the impact of tourism in Maine. **Deadline for submission: mid-June.**

MaineBiz U presenters must have the depth and breadth of experience and expertise to present relevant, timely and interesting information in a concise and organized fashion. It is important that speakers have a command of the room, ability to engage the audience and be able to provide quality materials and takeaways. All sessions must be educational, promotional presentations will not be considered. If you have previously presented sessions that have qualified for CEU credits, please let us know.

The Convention schedule includes three MaineBiz U sessions covering a broad base of business topics. Each session will last 60 minutes, including a brief Q&A, with starting times of 9:30am, 10:50am and 1:00pm. Proposed sessions will be reviewed and evaluated by the MaineBiz U Steering Committee and must be educational, have a well-defined focus, be relevant to the industry, include practical applications of material and be timely.

Competing sponsors:

[Eaton Peabody](#) (Maine U Sponsor), [Pierce Atwood](#) (Supporting Sponsor)

Additional opportunities:

Other MaineBiz events and awards

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2. Maine Startup and Create Week—

What: Weeklong event focused on innovation
When: June 19-23, 2017
Where: Portland
URL: <http://www.mainestartupandcreateweek.com>

Networking:

Week of learning, interviews with leaders, hands-on workshops, and social events.

Sponsorship opportunities:

[Become a Donor](#)

Maine is at a pivotal moment to be a leader in business, technology, innovation and design. This is your chance to get your brand in front of thousands of people and hundreds of businesses both from Maine and beyond! Join us in moving forward. To learn more about 2017 donor opportunities or discuss other ideas, contact us at MSCWsponsors@gmail.com.

[Community Engagement Partner](#)

Organizations across the state are welcome to join us in making MSCW our third success in a row. Possible ways to partner include helping us spread the word, providing volunteers, hosting an affiliated event, sharing entrepreneurial stories, and offering your members a discount. We are also open to hearing how you want to participate.

[Affiliated Event Host](#)

Local organizations and companies are encouraged to host partner events during Maine Startup and Create Week. An affiliate or partner event is independently organized, related to growing and scaling a business, and does not conflict with the conference schedule.

Call for speakers:

A look at last year's speakers: <http://www.mainestartupandcreateweek.com/speakers/>

Competing sponsors:

[PretiFlaherty](#) (Presenting donor)

[Verrill Dana](#) (Partner donor)

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3. Maine Center for Entrepreneurial Development—

What: Monthly gathering of entrepreneurs
When: Dates vary
Where: CloudPort, Portland
URL: <http://www.mced.biz>

Networking:

Maine Mentor Network: Gives entrepreneurs access to the most extensive network of professionals in Maine. These are talented mentors with demonstrated success, bringing their deep industry knowledge and real world experience to bear on the roadblocks and issues businesses might encounter on their road to success.

Sponsorship opportunities:

MCED needs your help to continue to provide these services to Maine's scalable entrepreneurs. While our funding partners have been exceptionally generous, we need to have matching funds from the private sector in order to provide the level of services that our entrepreneurs require. Sponsorship levels range from \$750/year to \$20,000/year. Be a part of Maine's future by supporting entrepreneurs today!

Sponsorship Levels	Benefactor \$20,000	Underwriter \$5,000	Sponsor \$2,500	Partner \$1,500	Friend \$750
Exclusivity in a category	●				
Speaking opportunity at a major event	●	●			
Display Materials at event(s); profile in MCED Newsletter	●	●	●		
Signage at MCED offices, events	●	●	●	●	
Logo on MCED website; name in program material	●	●	●	●	
Listing on MCED website	●	●	●	●	●

Call for speakers:

- Lunch & Learn sessions: A 2-hour dive into a specific area of business in a talk and discussion format hosted by an expert in that field. Pick the brain of an industry expert and go back to the office with a list of ideas to implement. This program is open to anyone.
- Table Talk Workshops: TABLE TALK: A deeper dive into some of the more complex topics that entrepreneurs and business professionals encounter as they strive to stay competitive. With an intimate setting limited to 12 attendees, Table Talk participants benefit from dynamic group discussion and interaction with the workshop presenter.

Competing sponsors:

[Verrill Dana](#), [Pierce Atwood](#), [Bernstein Shur](#), and [PretiFlaherty](#)

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4. Maine Real Estate & Development Association—

What: Events throughout the year
When: Dates vary
Where: Locations vary
URL: <http://mereda.org>

Networking:

As a member you have the opportunity to connect with a diverse network of real estate professionals and related service providers. Many beneficial business relationships have been established over the years through networking opportunities like the annual fall social.

Upon receipt of your dues contribution, your company will be listed in the Membership Directory located within the **MEREDA** website at www.mereda.org and you will receive the password to the Members-Only Section of the website.

Sponsorship opportunities:

Interested in gaining more exposure for your organization? Sponsorship can provide your company with high visibility and preferential treatment on event publications, press releases, and the MEREDA website. Contact the MEREDA office for information on the many sponsorship opportunities! <http://mereda.org/sponsorship.php>

Call for speakers:

We host timely and informative events throughout the year that attract members and other professionals who have an interest in working with us. The annual forecast conference and member showcase in January attracts 700+ attendees, and the spring conference has brought industry experts like noted Futurist and Wharton School Professor, Dr. Susan Wachter, land use strategist, teacher, developer, researcher and author, Christopher Leinberger of the Brookings Institute, and nationally renowned architect, Ellen Dunham-Jones to Maine. The statewide educational seminars cover a range of topics from financing options to environmental due diligence and new urbanism.

Do you have a suggestion for a future MEREDA breakfast seminar? Is there a "hot topic" you'd like to see MEREDA cover? The MEREDA Conference Committee encourages all Members to submit their ideas for an upcoming event. If it picks your topic, you could receive a free pass to the event! To submit a suggestion or become more involved in MEREDA's Conference Committee, contact the MEREDA office at 1-207-874-0801 or by email at info@mereda.org.

Competing sponsors:

[Drummond Woodsum](#), [Eaton Peabody](#), [Pierce Atwood](#),

Additional opportunities:

Membership
Awards

Murray Plumb & Murray

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5. The Institute for Family-Owned Business—

What: Events throughout the year
When: Various dates
Where: Various locations
URL: <http://fambusiness.org>

Networking:

Programs and events are designed to allow ample opportunities for prime networking, developing new relationships, strengthening existing relationships, and education with like individuals facing the challenges and opportunities that family-owned businesses share.

Sponsorship opportunities:

The IFOB provides programs, workshops, and services on issues ranging from business succession planning to estate planning to conflict resolution to intergenerational, sibling, & gender issues. In 2016, they had more than 35 programs. Each year they have an overall programming theme. This year it was “Succession Planning in the 21st Century.”

Call for speakers:

Speaker requirements:

- Experienced teaching adult learners
- Knowledgeable with the content of their presentation.
- Familiar with the components of an effective and interactive presentation.
- Willing to work with the program committee to design and prepare the final program.
- Submit completed application to the IFOB Program Committee for review.

Call 1-207-798-2667 or email catherine@fambusiness.org. More information and application available at: <http://fambusiness.org/page-1841540>.

Please note the Programming Committee accepts applications throughout the year. In the fall, the Committee meets to review applications and then presents all programs to the Board for final approval.

Competing sponsors:

[Verrill Dana](#) (Founding sponsor, Awards sponsor)

Additional opportunities:

Membership

Murray Plumb & Murray Brand Discovery

6. World Affairs Council of Maine—

What: Various programs
When: Varies
Where: Varies
URL: <http://www.wacmaine.org>

Networking:

Programming includes:

- Annual Meeting
- Education programming
- Global Connections Lunchtime Series
- Global Insights Series
- Great Decisions Dinners
- International Breakfast Series
- Internationals Visitors Program
- WorldQuest

Sponsorship opportunities:

Global Partners Circle, Global Education Partners, Sponsors

Call for speakers:

See programming above

Competing sponsors:

[Bernstein Shur](#)

[PretiFlaherty](#)

[Verrill Dana](#)

Additional opportunities:

Membership

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7. Pub Hub—

What: Monthly gathering of entrepreneurs
When: First Wednesday of the month, 6-7:30pm
Where: Mechanics' Hall, Portland
URL: <http://www.pubhubmaine.com>

Networking:

Connect with Maine's entrepreneurs, business service providers, investors, and others interested in connecting. You'll meet people from all kinds of companies – the next great startup, the growing small business, and Maine's biggest firms. Connect with people who have launched a bunch of companies, or meet the newest entrepreneur on the block.

Sponsorship opportunities:

Contact Allison Harris at alison@harrismediaservices.com

Call for speakers:

This networking event features a speaker with real-world business expertise to share insight on business development, growth, and entrepreneurship.

Maybe you have an idea for who should be the next speaker? Let us know. We ask that all speakers share business information that can be helpful to others – this isn't the place for a sales pitch. If you know someone who wants to share his/her expertise, introduce us. Just reach out to Alison Harris at alison@harrismediaservices.com, and she'll be in touch.

Competing sponsors:

[Opticliff Law](#)

[CuroLegal](#) (past speaker)

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8. Name—Maine Motor Transport Association

What: Annual Banquet + additional opportunities
When: January 12, 2017
Where: Holiday Inn By the Bay, Portland, Maine
URL: <http://www.mmta.com/page/952/home>

Networking:

Trucking industry's biggest night, which includes a meeting, hospitality reception, dinner, awards, and entertainment.

Sponsorship opportunities:

- Annual Sponsorship Program
Platinum - \$3,500, Gold - \$2,500
- Board/Membership Meeting Breakfast Sponsor
Cost: \$400 (on a first come, first served basis)
Contact: Sylvia St. Pierre at (207)623-4128 or e-mail at sylvia@mmta.com
- Maine Professional Truck Driving Championships
Grand Champion Trophy, Team Trophy, Best Written Exam, Rookie of the Year, Best Pre-Trip
- Maine Truck PAC Golf Tournament
Major - \$500, Hole Sponsor - \$150/each, Door Prize Sponsor
- MMTA Annual Banquet
Platinum - \$1,000, Gold - \$500, Silver - \$250, Bronze - \$100
- Sponsorship contact information: Call Brian or Tim at 207.623.4128 or <http://www.mmta.com/page/2-756/sponsorships>

Call for speakers:

Various events throughout the year

Competing sponsors:

None

Additional opportunities:

Membership

Awards

Murray Plumb & Murray

Brand Discovery

9. Name—Maine HR Convention

What: [Maine HR Convention](#)
(Also [Strategic HR Mt Washington](#) and [Worker's Comp Summit](#))
When: Maine 9-12, 2017
Where: Samoset Resort
URL: <http://www.mainehr.com/page/1003/about-us>

Networking:

Thriving network of human resources professionals, labor-management attorneys, and workers' compensation experts for advice, analysis, and ideas

Maine HR Convention: 1) Keynote talent from across U.S. 2) Programming to uncover HR skills, build great workplaces, and become legal compliance leaders 3) Camaraderie that turns this convention into an experience, not just another event

Strategic HR Mt. Washington: Engage with a senior-level, strategic-thinking audience in every aspect of the conference. Discover programming that encourages you to think big. Share HR lessons you've learned along the way

Worker's Comp Summit: Comp Summit is Maine's annual, system-wide event for the workers' compensation community.

Sponsorship opportunities:

Contact Heather Bassett, EXPO Manager for more information and Business Partner availability: Heather@StrategicHRus.com or 207.761.8350.

Call for speakers:

Requires further research

Competing sponsors (Maine HR Convention):

[Bernstein Shur](#) (Convention Tote Sponsor)

[PretiFlaherty](#) (Keynote Sponsor)

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10. Portland Regional Chamber of Commerce—

What: Programs such as Eggs & Issues, Annual Awards Gala, Business After Hours, Etc.
When: Various dates
Where: Varies
URL: <http://www.portlandregion.com>

Networking:

Networking seminars, Experience Greater Portland (typical attendance of more than 100 people sharing information and leads), and Business After 5 (typically draw 30-75 people) are networking opportunities for Chamber members.

Sponsorship opportunities:

Varies based on event

Call for speakers:

Varies based on event

Competing sponsors:

Gold Circle Sponsors: [Bernstein Shur](#), [Verrill Dana](#)

Community Sponsor Spotlight: [Bernstein Shur](#), [Pierce Atwood](#), [Verrill Dana](#)

Additional opportunities:

Additional events and awards

Community Chamber events (South Portland, Cape Elizabeth, Falmouth, Cumberland, Scarborough, Portland, Westbrook, and Gorham)

Membership