

CLIENT SPOTLIGHT

JDKATZ, P.C., ATTORNEYS AT LAW, BETHESDA, MARYLAND

When your clientele includes heavy-weight boxer Riddick Bowe, the U.S. Surgeon General, CNN reporters, and C-level executives from the Fortune 100, you might not see much need for marketing. But if you're Jeffrey David Katz, founder and managing partner of [JDKatz](#), you've placed a priority on marketing with a variety of media to build and deepen client relationships.

"The guiding principle of our marketing program is what I call a deep dive," says Jeff. "This means broadening and deepening our client relationships (account penetration) by customizing both our solutions and messaging for different client constituencies. We want to raise awareness of the firm among buyers, referral sources and non-buyers who have shown interest in the firm, to position the firm as more client-centric and approachable than the competition. To this end, we gather client and user input to shape our outreach and thought leadership programs, so we can increase our deal flow."



The real-time "live" scheduling feature on the home page of the JDKatz website is one example of its unique client-centric approach. Visitors can access Jeff's schedule and pick up to three times to meet with him by phone or at the

firm's office in Bethesda for 30, 45, 60, 75 or 90 minutes.

"We wanted to bring down the wall that tends to separate attorneys from clients," says Jeff. "Attorneys are often perceived as being stuffy and unapproachable, but we want to make it easy for someone to talk to us and really connect. The scheduling feature is quite popular — 30% of the people we end up talking to use it. And once someone schedules (online or by phone), we'll make up to seven follow-ups to connect with the person — an automated process— by phone, e-mail and text message. We want to show our interest in working

together, and we want clients to know that we appreciate them." Feedback has been overwhelmingly positive: "To say clients love the system would be an understatement," says Jeff.

SMALL BUT CONCENTRATED

Katz founded the practice as a solo in 2000 after a stint with accounting powerhouse KPMG. "I started at the proverbial top, working on the MCI-Worldcom merger, which would later turn out to be one of the largest frauds in the history of public accounting," Katz recounts. "I decided to reboot."

Today JDKatz occupies an 8,500-square-foot AMLaw100 firm's former office space in Bethesda, Maryland, and consists of three full-time attorneys — Jeffrey Katz, Jeremy Rachlin and Christopher Young, with four in-house CPAs. It is a boutique firm focusing on tax law, business and estate litigation, and estate planning, and serves clients throughout the Mid-Atlantic from offices in Bethesda and in Washington, D.C. Despite its small size, the firm provides a big-firm level of service. That's because its team members have impressive credentials and strong experience in their practice areas.

For example, in addition to his law degree from the Chicago-Kent College of Law, Jeff has a Masters of Taxation (LLM) degree from the University of Miami and years of experience working with public companies, initially with KPMG-Peat Marwick, where he began his career. He is also a frequent contributor to such publications as *The Washington Business Journal* and recently authored the book, *Surviving the Maryland Sales Tax Audit*.

Chris Young brings six years of prior prosecutorial experience from the DOJ's civil forfeiture office, and most recently wrote extensively as a journalist at BloombergBNA. Similarly, Jeremy Rachlin, who has recognized expertise in estate and trust litigation, was named in 2014 as a "Super Lawyer" (one of the top 5% of attorneys) in Maryland and the District of Columbia. And Kenneth McCallion, Of Counsel, represented class action plaintiffs in the

Exxon Valdez oil-spill case, Union Carbide's Bhopal India plant disaster, and individual families of victims of the 9-11 World Trade Center terrorist attacks.

"We integrate products found in large accounting firms, like captive insurance, private annuities and equity strips, within tax minimization, corporate control and litigation avoidance strategies," Jeff says. "Our specialized expertise enables us to identify uniquely efficient and effective solutions for our clients — without big-firm sticker shock.

"For example, we've used clients' outstanding IRS liens to dispel other would-be suits, and ongoing or completed tax audits to resolve others. We've ended tax audits by providing bankruptcy and litigation files to the auditors in response to legal requests — either pointing them in the right direction or overloading them with information — often resulting in a no-change audit. We've minimized tax penalties and assessments by granular analysis of books, records, and corporate structures, and guiding auditors in who should, and shouldn't be charged.

"Many of our clients find our consultative, team-oriented approach a refreshing change from the arch attitude at many other law firms. We try to maximize returns and minimize risks for our clients, not run up the tab."

DRIVING PEOPLE TO ITS WEBSITE

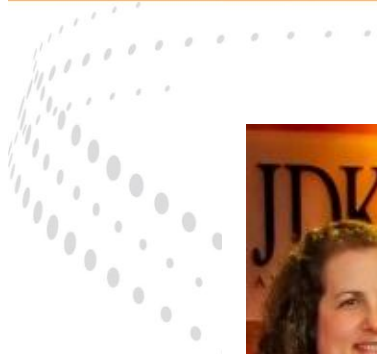
Jeff's marketing program is designed to drive people to the firm's website, where, ideally, they will schedule a meeting, ask for a free consultation or call to learn more about JDkatz and the services it provides.

To get people to visit the site, the firm sends out a monthly e-newsletter (from BizActions) on tax and estate planning subjects to a list of 3,500. Thanks in part to edgy subject lines like: "Maryland Named Worst Place to Die, Considers Changes to Estate Tax," "The High Cost of Exercise — DC Yoga Tax", and "Marijuana, Minimum Wage and Estate Tax Highlight Busy Session for MD Lawmakers," JDkatz enjoys an enviable open rate of 30% to 40%.



The firm also pushes people to its site through [its Facebook page](#) (it has more than 1,000 Likes), on which it posts information on tax and estate planning subjects, as well as on developments at the firm. And it uses an integrated approach from Google to place a cookie on the browser of people who search for a service the firm offers, to encourage them to revisit by a click on the sidebar ad.

To make the site worth visiting, Jeff has made it a helpful resource on tax, estate planning, elder law and business law — the firm's main practice areas. It runs a [blog on tax and estate planning](#) topics that includes content from PDI Global, as well as posts written by firm members, and that won an award from Freshly Pressed. In addition, the firm posts weekly [Tax Bites](#) from BizActions



Dottie Gottfried, Morris Topf, Davis C. Burroughs IV, Jeffrey D. Katz, and Jeremy D. Rachlin.

and offers a free [tax planning guide](#) (from PDI Global) in exchange for filling out a form, which includes a box visitors can check to subscribe to the firm’s newsletter.

Jeff makes use of new technology to increase engagement and encourage contact. In addition to the real-time scheduling, the home page features videos that introduces the firm and invites visitors to look through the site.

“We’ve hired voice over artists from the likes of Disney and NBC, produce our own in-house video and infographics, and really try to think about the site design,” says Jeff. “Our infographics (the firm produces its own) cover a variety of topics, such as Maryland sales tax and estate/inheritance tax rates, which are re-blogged, reprinted and re-indexed on the search engines. Other pages offer newsletter subscriptions and other resources in exchange for filling in a form.

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“Our marketing efforts via our newsletter, website and blog have helped develop and drive our reputation as thought leaders who deliver the goods.”

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“Just like our practice, we’re constantly evolving our website. We often make multiple copies of the same web page and track clicks to see which

gets more attention. We use analytical tools to tweak our messaging to make sure we’re getting attention and getting the most out of our site.”

CAPITALIZING ON REFERRALS

In addition to its website and content marketing tools, the firm integrates networking and involvement to develop leads and new business.

For example, Jeff belongs to the Montgomery County Bar Association and the Maryland State Bar Association and is actively involved with the Entrepreneurs’ Organization (EO), where he serves as the local treasurer. Jeremy is a member of those bar associations, as well as the Montgomery County Bar Foundation, a bar leader, and an active participant in the University of Maryland Honors Alumni and Terrapin clubs.

“Roughly 80% of our business comes from repeat referrals, so keeping us front and center in the minds of our clients and referral sources is essential, because out of sight is out of mind,” says Jeff.

“We’re lucky to have built a strong reputation for a thorough knowledge of tax and business law, and for providing services that efficiently guide businesses and individuals to their legal goals. Our marketing efforts via our newsletter, website and blog have helped develop and drive that reputation as thought leaders who deliver the goods. These marketing tools are the proverbial tip of the iceberg, and they play a major role in our success.” ☺