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MARKETING IN PROFESSIONAL SERVICES

ASIA • AUSTRALIA • NEW ZEALAND

REVIEW 06/07



“The client was **knocked out!**”

Remember those days when marketing was short on ideas, but long on lunches?

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Marketing Recruitment for Professional Services

After an era where professional services marketing was a nice add-on focusing on websites, newsletters and client entertainment, the profession has now become a valued, vital function within a firm.

We would like to thank all those who participated in this year's survey into the trends and issues facing professional services marketers.

We would not be able to identify and understand key issues, problems and priorities without your time, willingness and valued thoughts.

The better we understand the changing and dynamic environments of professional services firms, the better suited we are to meeting your challenges and needs. We are proud to be able to share this information with you.

We would also like to thank Angela Woodruff and David Murphy for their research and Susan Acreman of Wolf-Ollins for her valued comments.

Thank you again for your time. Please feel free to share your ideas, suggestions or comments with me at graham.seldon@seldongill.com.

We look forward to working with you again in the future.



Graham Seldon
Director
Seldon Gill Consulting

As a leading recruitment firm focused on professional services marketing, Seldon Gill Consulting is committed to maintaining current knowledge of trends and challenges facing practitioners in the field. We understand the value that professional services marketers place on keeping up-to-date with the ideas and reflections of their peers and are therefore pleased to provide an insight into these findings with the presentation of this report.

In July 2006, an independent researcher was commissioned by Seldon Gill Consulting to interview 75 senior marketing managers and marketing directors within law, accounting and management consulting firms across Asia, Australia and New Zealand.

The survey revealed that to successfully manage a marketing department within a firm, a professional marketer will ideally be armed with a set of concepts to form a marketing strategy and develop systems to manage staff and workload. They must be equipped to work in a culture that is often associated with politics and partnership environment issues and use influence and strategy to promote a strong relationship between the marketing department and the rest of the firm.

From speaking with marketing professionals, we were able to gauge their thoughts and perceptions regarding these factors. This report is divided into three sections covering the **Conceptual**, the **Practical** and the **Political**.

This survey sets out to provide leading-edge knowledge and insights into trends and challenges facing marketing practitioners who operate in the professional services sector. The aim was to find out what issues they faced in their day-to-day working lives and where their priorities lie.

In July 2006, independent market researcher Angela Woodruff was commissioned by Seldon Gill Consulting to conduct telephone interviews with 75 senior marketing and business development managers and directors. Respondents were from small, mid and top-tier law, accounting and management consulting firms. All respondents held senior positions – many of which were the main decision makers within their teams and managed people across a region.

Of the Respondents:

- 57 worked in law firms, 14 worked in accounting firms and 4 worked in other professional services firms
- 48 respondents were based in Australia, 17 in Asia (mainly Hong Kong) and 10 in New Zealand

The questionnaire was based on issues raised at several roundtables and talks held with candidates and clients over the last 18 months. Participants were spoken to for an average of 20 minutes and were asked a set of open-ended questions. Answers were taken verbatim and participants could answer freely and openly.

The opinions expressed and printed in this report belong to the individuals who participated and do not necessarily reflect those of their firms.

An uneven spread across professional services was a limitation of the survey – with the majority predominantly coming from accounting and law firms. As a result, all findings will be presented in relation to law and accounting. This provides the most effective, worthwhile results.

The Conceptual

How professional services marketers apply concepts and ideas to achieve their firm's business strategy.

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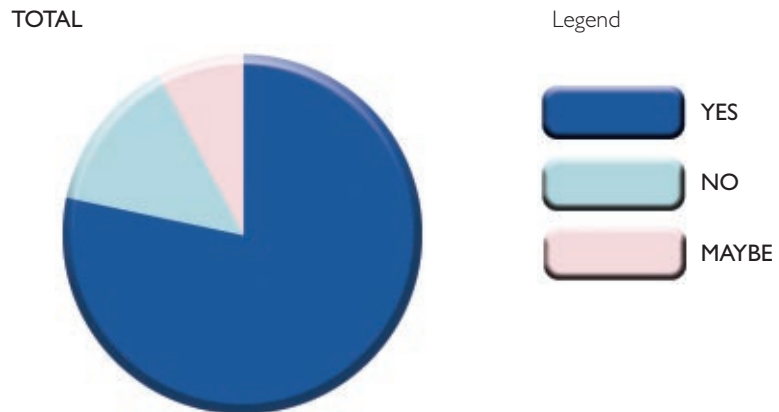
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Throughout their careers, professional services marketers will apply concepts and ideas to their work in order to achieve their firm's business strategy. To ensure success, these ideas must be closely aligned with the expectations of their clients – both internal and external. We asked a series of questions to gauge what the current priorities were. In particular, we looked at the relationship between business development and marketing.

Figure 1: Has there been a shift away from traditional Marketing Communications towards Business Development? (All respondents)



Marketing Communications v Business Development

“Professionals don’t appreciate soft marketing but they think they understand business development more – despite the fact that the line between the two is blurred.”

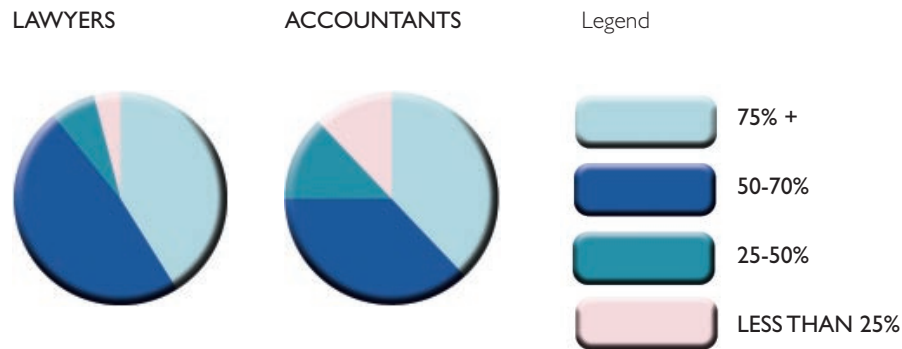
National Business Development Manager, Australian law firm.

Understanding whether professional services marketers now consider practices such as business development to be generally more important than traditional marketing and communications techniques was central to our survey. We also looked into whether the way firms now promote themselves reflect such a shift.

Our survey reveals that a majority of respondents believe that such a shift towards business development has occurred - across both law and accounting (figure 1). Respondents in the legal market identified increasing competition as its primary driver. Feedback suggests that the reason business development – with an emphasis on specific client needs – has become a higher priority is because of the large availability of legal services in the market. This increased supply means the demand for targeted, specialised services has also heightened. One national manager of client relationships at a major Australian law firm remarked that his increasingly “savvy and educated clients” demand “greater commerciality and a better understanding” of their businesses. This sentiment was mirrored several times, with one Singaporean counterpart regarding the expansion of international firms and their infiltration into the market as necessitating “a focus on more important clients, delivering services to them and developing new business there”.

Demonstrating return on investment (ROI) on their work was important to the majority of participants. Measurable ROI with business development activities, it was felt, effectively demonstrates the value of their teams’ contribution to the profitability of their firm: a critical factor for most as pressure on their performance increases. One national business development manager of an Australian law firm stressed this increased emphasis on visibility with regard to her team’s input: “professionals don’t appreciate soft marketing but they think they understand business development more – despite the fact that the line between the two is blurred”.

Figure 2: What proportion of time in your firm is spent on Business Development relative to Marketing Communications?



A Hong Kong chief of business development and asian development agreed, suggesting: “partners can see a much more tangible ROI” when it comes to business development. “It’s even gone one step further from business development to account management.” It is important that this visibility/measurability factor is taken into account as an influence on strategy independent of actual performance.

The maturing asian market, which recorded the most significant shift, is also an important driver in the increase of the business development focus. Said by one Hong Kong regional head of business development for an international law firm: “it’s all about effectiveness—partners are only interested in very specific initiatives, not broad-based activities. This is about building trust in lawyers and their brand.” A counterpart in another international law firm also based in Hong Kong credited the shift to “complex, bigger transactions and more tenders” which put “more importance on building client relationships”.

The rapidly increasing volume of legal work originating from China - especially complex banking sector and M&A related work - is still largely being handled within Hong Kong so mainland firms are following the successful marketing practices of their Hong Kong cousins. This high growth area contributes towards what several of our respondents regard as a global push towards specialist skills and client relationship management.

From this research, there is a greater emphasis on business development over traditional marcomms from law firms – more so than in accounting firms (figure 2). The reason for this seems not to be that accounting firms are more beholden to traditional marcomms, rather this move towards business development came earlier to accounting firms and therefore the shift is perceived as less immediate. Said by one business development/marketing director in a major Australian law firm: “lawyers are still behind accountants” despite a “shift in partners’ mentality to being a corporate integrated organisation”. Within the same firm, a colleague added that the increasing focus on business development shows that “the legal profession is trying to catch up with what accounting firms have done”.

Business Development – Common Strategies

“It’s all about effectiveness – partners are only interested in very specific initiatives, not broad-based activities. This is about building trust in lawyers and their brand.”

Regional head of business development, Hong Kong-based international law firm

General comments from the respondents revealed that at the heart of business development is direct sales strategy, through direct client interaction.

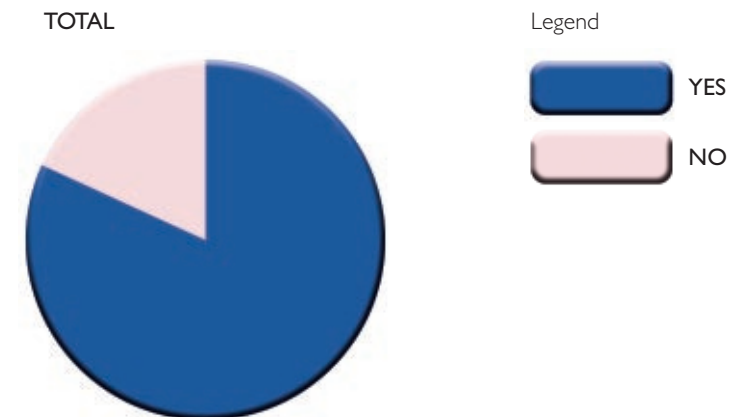
Common strategies included:

- Client segmentation analysis, prioritising clients and prospects
- Key client programs
- Programs identifying new potential revenue streams and pitch strategies
- Strategic direct client contact (seminars and entertainment)

Greater Emphasis of one-on-one Client Relationships

Many respondents said they use a range of tactics, with some larger firms employing a layered approach which ranks clients with their value and then distributes resources accordingly. Said by one business development/marketing manager for an Australian law firm: “we assign key client relationship programs for top clients and direct sales programs to other clients who are not top clients”. Another law firm marketing manager spoke of his Top 50 Client Program. Results show more firms have moved toward direct sales strategy (figure 3), with recurring comments on one-on-one client relationships.

Figure 3: Do you have a direct sales strategy? (All respondents)

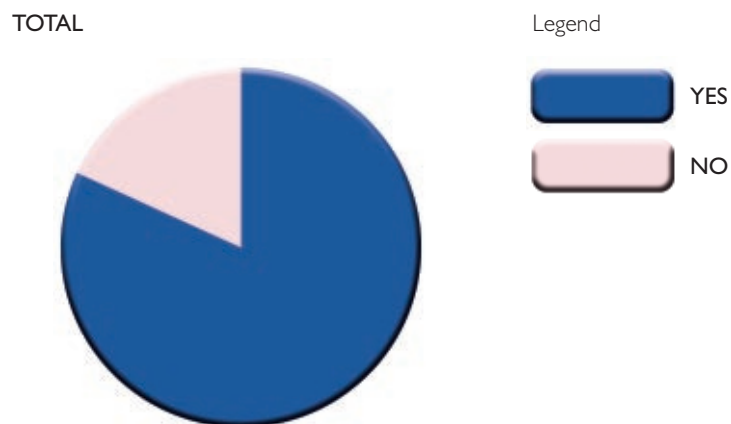


This partner-to-client direct relationship is understood as central to business development. Respondents in Asia-based roles emphasised global strategies supplementing one-on-one relationships - a tendency which would suggest a more minor role in planning strategy for Asia-based business development/marketing personnel.

One area of business development that appears to be on the rise is in the area of training/coaching around bids and pitches. In an environment where one-on-one relationships are so important, this coaching is where business development teams demonstrate value.

Varying attitudes towards pitch coaching within firms did occur. One Australian senior marketing manager described it as something partners “really buy into” in “a very competitive, tough market,” with a counterpart in a similar firm remarking that “partners are very reluctant, they don’t think they need it and find it distasteful”. Many found that as pitch coaching is essentially training, they take a different approach depending on the seniority of the fee-earners involved (figure 4). It was generally regarded that accounting firms had the most sophisticated systems in this area.

Figure 4: Does your firm have pitch coaching? (All respondents)



Marketing Communications

“The strongest brands in professional services have a deeply ingrained culture that is built on their ‘big idea’ (the vision and sense of purpose for the firm) and expressed through the behaviour of their people as well as their communications.”

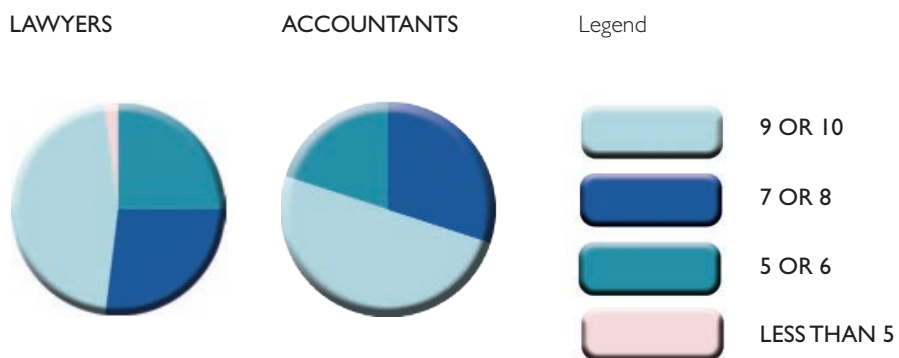
Marketing Manager, international accounting firm

With the shift towards business development, firms across all markets said that an increased focus on individual performers within firms diminishes the relevance of their brand. This raises the question of the importance of a collective brand and how marketers tackle the issue of defining an overall brand whilst promoting the individual practitioners within it. Seldon Gill consulted Susan Acreman of Wolf-Ollins, the international brand consultancy in London, to examine this trend.

“It feels that there’s quite a lot of misunderstanding about the role of branding within professional services which can create a degree of cynicism about its value. Often, due to the fact that people tend to associate brands with fizzy drinks and washing powder, they think that it’s all about the ‘logo’ and colours – fluffy stuff that’s nice to have but not crucial to business success. Of course the visual identity of a firm is important but this is only part of the picture when we look at brand. Being very clear about the commercial drivers and objectives of a brand development process is crucial. In a market where the services of the top firms are increasingly similar, the role of a brand will become even more important in attracting the right clients and the right talent and keeping them loyal to the business.

“You have a brand. The way you manage it will affect your future. At its most basic, brand is about enabling choice by creating a clear point of differentiation between one firm and another. We do this by understanding the ‘big idea’ of what you stand for as a business: the idea that captures not just what you do, but how you do it. In professional services, this ‘how’ is crucial because it is often the area that really separates one firm from another. The strongest brands in professional services have a deeply ingrained culture that is built on their ‘big idea’ (the vision and sense of purpose for the firm) and expressed through the behaviour of their people as well as their communications.”

Figure 5: How strongly do you rate brand identity out of ten?

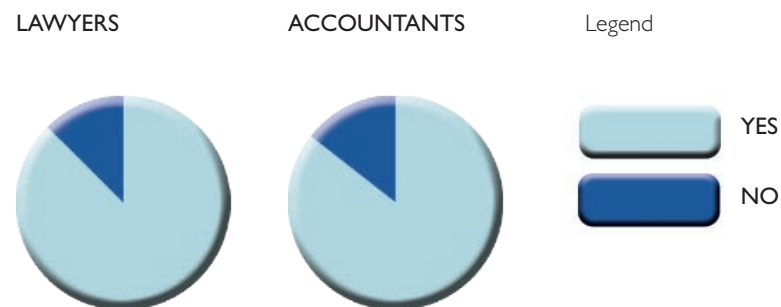


When asked "how strongly do you rate your brand identity out of ten" (figure 5), most felt that their brand identity was strong however it was generally thought that no firm had really differentiated themselves clearly from their competitors. Said by one Marketing Manager of an international law firm:

"Law firms can tend to be grouped into bands – such as the 'Magic Circle' in London and the 'top tier' firms in the Australian market."

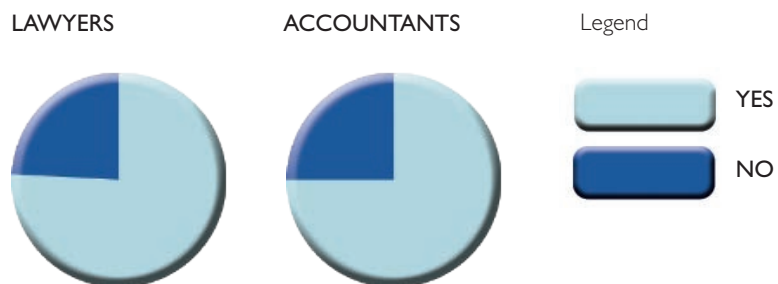
This was further emphasised by one Australian national marketing director: "the whole industry is not differentiated enough" with several agreeing that it is difficult to brand what is essentially a group of individuals: "clients often look for individuals rather than firms when they look for advice".

Figure 6: Do you have media training for your fee earners?



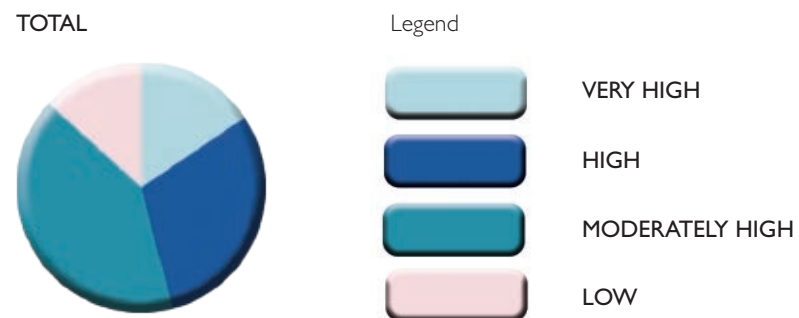
The need to raise and monitor the profile of individual fee-earners means that interest in media representation was consistent across markets in legal and accounting firms. Whilst some collected press clippings internally, most firms employed press clipping agencies. Media training appears mainly available to senior fee-earners and those expected to be dealing with media (figure 6). It was generally conducted on an ad-hoc basis. The proliferation of Australian publications focused on law – including *Lawyers Weekly*, *Australasian Legal Business*, *Melbourne Lawyer*, *Sydney Lawyer* and *Brisbane Lawyer* – was brought up by some as being a reason why media training was on the increase in law firms.

Figure 7: Internal Communications: do you have a specific program?



When it came to internal communications, 72% said that they had some kind of internal communications policy or program in place. When asked how successful are these programs, the majority ranked it between five and seven out of ten. Said by one marketing director of an international accounting firm: "it is a big priority but sadly it's a poor relation of external comms".

Figure 8: How high on the agenda is internal communications? (All respondents)



There were several respondents who said they have devoted time and resources to improving internal communications. A New Zealand legal marketing manager stated that "it is very high on our agenda – we have done a lot of work on our culture" with another marketing manager of a law firm stating "we consider it pretty high – we have a weekly newsletter". The majority of respondents said that, while they are conscious that there are not sufficient internal communication procedures in place, they wished for it to be higher on their agendas and that it is an area which will be in line for some further attention (figure 8).

Our research shows that increased competition in professional services has resulted in heightened pressure on marketing/business development teams to provide more specific, targeted services to clients. They must also demonstrate a more tangible return on investment within their firms.

The next section explores how this thinking is shaping the practical dimension of organising teams around these goals.

To gain a sense of how marketing principles are applied to their work in a practical sense, we quizzed our respondents on what the major issues they faced as managers were and examined the nature of their teams.

To provide some context as to the nature of the work undertaken by our respondents on a day-to-day basis, we asked them what task lay currently at the top of their inbox.

Tasks currently at the top of respondent's inboxes

- Client strategy, communication and research issues at **30%**
- Tenders and pitches at **25%**
- Internal management issues (including staff appraisals and recruitment) at **22%**
- Budget issues at **13%**
- Media issues at **10%**

In fulfilling these tasks, respondents outlined many challenges facing them. In broad terms, these can be divided into issues surrounding managing people, managing workload and resources, and attitudes towards outsourcing.

Managing People

Hiring and maintaining talented staff was one of the most frequently cited challenges. Defined by the marketing manager of a major Australian law firm as “the war for talent”, a skill shortage across the industry is becoming a major concern for professional services marketing directors as they seek continuity in their teams. However, this high turnover of staff was also seen to have its advantages. Said by one marcomms head, new employees come in “fresh and challenged... familiarity with the role can be a danger”.

Nowhere is this skills shortage more acute than in Asia. There were several concerns about the difficulty of attracting quality staff, captured simply by an international law marketing manager: “there are not the people in Hong Kong to hire”. This was further emphasised by another: “it is ten times more competitive in Asia in both winning clients and retaining the best people” as “you are competing against all the global firms based in Hong Kong”.

Seldon Gill Consulting's own experience of recruiting more and more Australian professional service marketers for the Hong Kong market strongly supports this. As one marketing manager of a Hong Kong based law firm put it: “the market here is not as sophisticated in their marketing. It's getting better but there's a long way to go.”

“The firms like Australian-experienced marketers as we are the benchmark in terms of professional services marketing.”

Marketing Director, Asia law firm

This skills shortage has led to a willingness of some firms to look outside professional services marketing when recruiting their teams. The advantages from hiring from outside were seen to include bringing in new ideas, especially the expertise from experience in other sectors. Bringing in outside thoughts and ideas is seen to also stop the continual rotation of “the same people among similar positions in the professional services marketing community”.

Nevertheless, this does have its disadvantages. A lack of understanding of the way professional services firms operate – especially in law firms which have less clear-cut hierarchies than other sectors - can hinder the building of effective relationships with fee-earners. Feelings of frustration with diminished influence was also reported.



The greatest reluctance to hiring from outside was recorded in law firms. The management culture of more traditional firms was believed by some to be too great to overcome for those without specific experience of operating within it. Comments made on this culture issue ranged from “for the majority of people, it is not a success” to describing the experience as descending to the “seventh circle of hell”.

With issues including maintaining staff, encouraging maximum productivity and focus and being a good manager, there is also the question of motivation. Across the board, performance bonuses were offered by firms at a rate of about two to one. Beyond this, to keep team members engaged in and enthused about their work, many managing directors remarked about the importance of career development. As the marketing director of a major Australian law firm expressed it, team motivation requires a strategy for “keeping people long enough to develop careers—particularly Generation Y”, a situation exacerbated by “the pressures on salary in a flat Australian market”.

Aside from the concern of staff feeling that they have a clear career path, many respondents cited the need for employees to engage with the increasing sophistication of their tasks, especially where their teams are playing a greater strategic role in firms. It was found that all firms surveyed had some form of training programme and that an awareness of the value of training was growing.

Managing Workload

Proliferating responsibilities, limited resources and geographic spread all add to the increasing challenge of having a more strategic focus for marketing directors. Many have to take on responsibilities as diverse as budgeting, recruitment, managing technology and strategy. Respondents from larger firms commented on the difficulties of managing teams spread across the region and the globe – an issue which throws up more challenges of trying to ensure all members are “consistent and integrated with the rest of the firm”. Others felt that the more successful their team’s contribution to their firm, the more expectations and responsibilities were placed on them - often without the appropriate increase in resources.

The most common solution offered to the dilemmas of being overstretched was to hire more people. However, several respondents suggested more efficient procedures and structures than to simply increase headcount. Said by a marketing manager in a global accounting firm: “more effective systems” could be put in place in areas such as IT where they are “complex and not as integrated”. Others suggested the solution of more effective expectation management strategies which would allow marketing directors to “take a more holistic approach” and “not get distracted by task to task implementation”.

Outsourcing

A clear majority of respondents said they outsource tasks. These include research, recruitment, IT services, proposals, training, printing, public relations, advertising, design, copywriting and events. Accounting firms recorded that they are more inclined to outsource than law firms, with the Australian and New Zealand markets being more receptive than the Asian market. It is worth noting here that our sample has a diversity of firm sizes. As the Asian firms surveyed were all of global weight, many have the internal resources available without having to look outside compared to the capacities of their Australasian counterparts.

Accessibility to outsourced services may well be greater or more developed in the Australian and New Zealand markets, however this is a branch of enquiry that lies outside the scope of this report.

As might be expected, services and skills outside the capacity of the firm was the main advantage that respondents identified with outsourcing. Another advantage was the inoculation against complacency from using internal resources. As one national marketing manager of a law firm put it, "external agencies encourage you to lift your standards, they push us forward. The danger of professional service marketing is that it can become internally focused. Outside people keep you going forward." The marketing manager of a New Zealand law firm encapsulated the sentiment of several other respondents on the benefits of outsider creativity: "you get fresh ideas in the door. We are a small team so it's useful for specialist areas like media training." Outsourcing also enhances the quality of internal information as it is impartial: "we had a client research project where we were getting feedback on us so we preferred to outsource this".

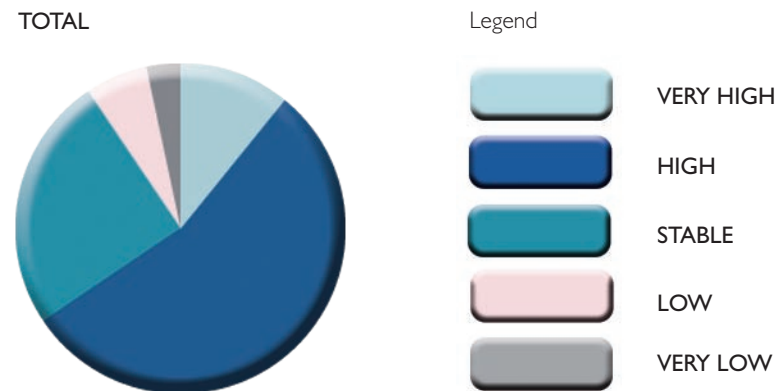
The disadvantages of outsourcing were summed up by one respondent: "there is a lack of a true understanding of the business, responsiveness, cost and accessibility". One of his counterparts added: "you have to have a relationship with the partners otherwise you can't get anything done".

Put simply, one respondent's reason for not outsourcing was because they are "control freaks who like to keep everything in-house".

Despite the myriad of challenges facing professional services marketing in a time of transition, job satisfaction was ranked as very high or high at a rate of two to one against those who ranked it stable, low or very low (figure 9). This suggests an industry which is comfortable with managing change.

Having explored the conceptual framework governing thinking in this industry and challenges of managing their implementation, the critical factor of how professional services marketers handle the politics of working within their firms must be addressed.

Figure 9: Perceived job satisfaction of marketing teams (All respondents)



“The place a marketing department holds within a firm and the contribution it is seen to make to a firm’s overall success are crucial factors which can determine the effectiveness of its members.”

Marketing Director; international accounting firm

In order to gain an appreciation of the internal politics which govern these dynamics, we asked a series of direct questions about the perception of the marketing team within each firm according to the marketers, the nature and status of the internal communications structure within the firm and whether fee earners are buying into the services they provide. We also asked a few indirect questions relating to the status of marketing within the firms, specifically trying to gauge the priority given to marketing managers by their presence on committees and their involvement in pricing and growth strategies.

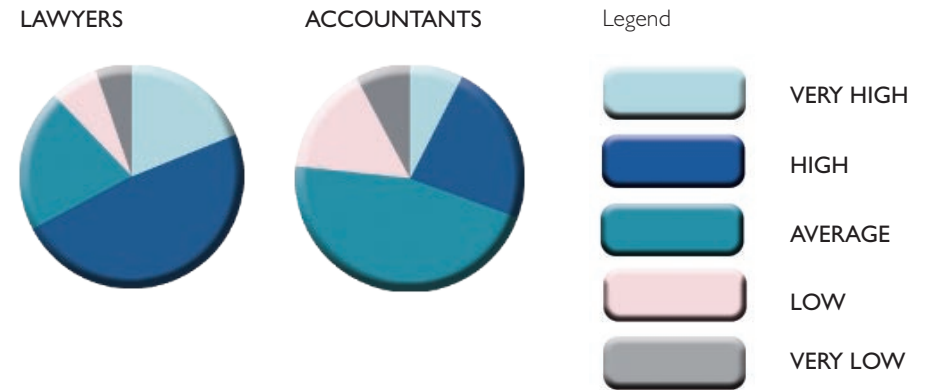
“We must be brought in at the right time, i.e. early enough to make a difference and before it is too late to challenge thinking because partners have invested in something.”

Marketing Director; Australian law firm

Value of Marketing

Our respondents’ feedback overwhelmingly agreed that the role of marketers must be valued within a firm so that they can achieve a “seat at the table” to influence strategy, and thereby increase their value. In cases where marketing is not effectively integrated into the management structure, marketing teams appear to flounder. Interestingly law firm respondents felt their teams were perceived higher than respondents from accounting firms (figure 10).

Figure 10: How highly does the firm regard marketing?



Where the overall marketing team perception within a firm was high or very high, it was almost always accompanied by “much improved”. This suggests that the efforts made by marketing teams to make themselves appear more relevant to the prosperity of their firms has been successful.

A Place at the Table

As a business development/marketing director (and board member) of a prominent Australian law firm reflected, in “getting a seat at the strategic table you have to earn respect and that takes time—you need to keep working on it”.

The critical means of doing this, it was overwhelmingly argued, was to continuously stress the links that marketing and business development have to the specific business model of the firm. "To manage the perception of marketing so that it has a seat at the table," said an Australian marketing director of an international law firm, you must "align metrics to the business so you can demonstrate value". Similarly, a counterpart said he thought marketers "really need to be involved in the early stages of planning for the business at a senior and strategic level, rather than just implementing the tactics that have been agreed by the professionals of the firm". Almost two thirds of respondents were involved in marketing committees at their firms (figure 11).

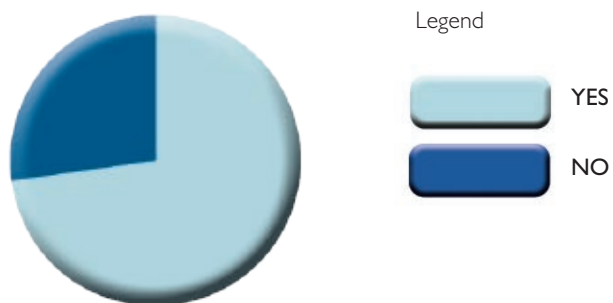
The marketing director of another law firm suggests that: "it is essential to be brought in at the right time, i.e. early enough to make a difference and before it is too late to challenge thinking because partners have invested in something". Difficulties in dealing with partners of law firms was highlighted by several respondents, to the extent that this disconnect between the thinking of marketers and fee-earners (one respondent said they seem to speak two different languages) may require an almost stealthy approach in timing strategic contributions. This disconnect was elaborated upon by a counterpart who starkly stated that:

“even if you are creative or brilliant, if you can’t sell your ideas to leadership then you fail – there is an ongoing challenge of persuading... the fact that lawyers are trained to see inherent risks can make persuading them to do new things difficult.”

Put boldly by another, it is hard to "get the time of the partners when they think in six minute units".

The Asian market, with its particular emphasis on business development, best illustrates the urgency in better understanding the advantages of using a marketing team. "In Hong Kong, the emphasis is really client related," said one marketing director of an Australian based firm present in Greater China. "It's getting out and being seen. Lawyers have to be out there constantly meeting people. Face time is imperative especially in China." Another Hong Kong based marketing manager noted that getting fee-earners to understand that "business development can help and that there is only so much one person can achieve" is vital. This underlines how significant the potential contribution of business development teams can be in coordinating and facilitating client relations, especially where they are able to offer culture-bridging skills.

Figure 11: Involvement in Marketing Committees (All respondents)



Conclusion

Research of senior marketing managers and directors in professional services firms, with a focus on the Asian, Australian and New Zealand regions, have provided an interesting insight for the rest of the world. This region – a condensed hothouse of professional services marketing talent – is an effective snapshot of the issues and trends faced by those in the industry.

Whilst priorities, focuses and trends differ from the small, mid and large tier firms – and from law, accounting to management consulting – marketing professionals can find comfort in knowing “they are not alone”. Justifying a marketing team’s position within a firm, being considered a management function and the split between communications and business development are all issues that many participants said they faced to a degree.

However from the findings it can be concluded that the positive certainly outweighs the negative and the majority of marketing teams are a valued function of a firm. Most believe their teams are working on significant projects and are providing a highly important, measurable and effective value-add to their firms. Job satisfaction is high across the board and, with a focus heading towards a business development and more strategic arena, marketers are contributing to a firm’s success, are providing fresh ideas, and implementing new systems.

After an era where professional services marketing was a nice add-on focusing on websites, newsletters and client entertainment, the profession has become a valued, vital function within a firm. More and more, they provide insight and commercial acumen and are considered an essential resource within the firms we spoke to.

Seldon Gill Consulting is pleased to be able to contribute towards a better understanding of the roles and demands faced by our clients within professional services firms. We will continue to conduct further studies and look forward to the continued cooperation of our clients and candidates.

Seldon Gill Consulting would like to thank the following firms for their support of our business:

Allen & Overy	KPMG
Allens Arthur Robinson	Lander & Rogers
Baker & McKenzie	Linklaters
Beaton Consulting	Lovells
Bell Gully	Maddocks
Chapman Tripp	Mallesons Stephen Jaques
Clayton Utz	Maurice Blackburn Cashman
Clyde & Co	Mercer
Davies Collison Cave	Middletons
Deloitte	Minter Ellison
DLA Piper	Phillips Fox
Ernst & Young	Phillips Ormonde & Fitzpatrick
Freehills	Piper Alderman
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