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October 15, 2004

To: All Sponsors and Exhibitors of LMA Events

**Re: Best Practices Policy**

Dear Sponsors and Exhibitors:

LMA is listening! In order to increase opportunities and level the playing field for all sponsors, the Legal Marketing Association ("LMA") has adopted the attached Best Practices Policy.

LMA, through its leadership, education and conference committees, will adhere to this policy, which is intended to offer guidelines and opportunities at all LMA national and regional events for sponsors, exhibitors, attendees, and LMA itself. Specifically, it outlines acceptable conduct and activities and LMA's commitment to address any situations that do not fall within the guidelines stated in the policy. All attendees, regardless of whether they sponsor, exhibit, or network at an event, are subject to the guidelines of the policy.

This policy is available on LMA's website. Simply click on the "Sponsorship & Ad" link and then the "Best Practices Policy" link. It also will be included in all future sponsorship packages.

If you have any questions regarding the policy, please contact one of the SRC members. A list of members can be found on the "Get Involved Committees" page of LMA's website.

Respectfully,

Sponsor Relations Committee  
Legal Marketing Association

Enclosure  
cc: Chapter Presidents Committee

## **Legal Marketing Association Best Practices Policy for Sponsors & Exhibitors**

This policy is designed to increase communication, fairness and opportunities for LMA's sponsors, exhibitors, advertisers and underwriters ("Sponsors") and to help LMA members and event organizers by establishing some Sponsor-related Best Practices. These best practices apply to all National events, specifically including the National Annual Conference, regional chapter LMA events, luncheons, seminars and webinars, as well as current or future LMA membership publications, such as Strategies.

Since the primary purpose of educational events is to educate LMA members and to provide networking opportunities, the following guidelines for appropriate sponsor behavior and LMA responsibilities apply.

Guidelines for Appropriate Sponsor Behavior:

- 1) LMA provides opportunities for the current Sponsors to have direct exposure to its membership through the marketing and promotion of that event, and the Sponsors are paying for the opportunity to promote themselves through their sponsorship dollars.
- 2) All Sponsors, whether sponsoring the specific event or participating generally as an LMA member, should behave appropriately and respectfully at any event.  
[Acceptable Sponsor Behavior is examined below.]
- 3) All Sponsors who are also LMA members should abide by the obligation not to detract from any other Sponsor's investment by competing with the sponsored LMA event, either directly or indirectly, at the sponsored event or by drawing the LMA attendance away from that event.
- 4) People who would be eligible to be a Sponsor, yet who are not sponsoring the actual event taking place, should not participate at that event other than in their capacity as an attendee, LMA member, committee member, or officer at the event. The purpose of this is to discourage any interference with the event Sponsor's opportunity to communicate with the event attendees.

Acceptable Sponsor Behavior includes:

- Arranging small group interactions or one-on-one meetings, such as off-site or on-site meetings or meals during any LMA event or conference;
- Arranging large group interactions, such as dinners or product demonstrations, at an LMA event that does NOT draw attendees away from the LMA event during scheduled sessions, meeting or social events; and
- Passing out business cards at anytime and passing out sales literature and premium items when you are the event sponsor.

Unacceptable Sponsor Behavior includes:

- Interrupting other Sponsor conversations; using the PA system for product/service promotion unless explicitly approved by LMA; soliciting people in other Sponsors' booths; covering or interfering with the viewing of another Sponsor's logo, or in any way directly or indirectly restricting or cutting off another Sponsor's message, signage or opportunity to sell.
- Disparaging or making factual misrepresentations about another Sponsor.
- Giving away sales materials or premium items at an event where individual or entity are not the Sponsor.

Guidelines Violations:

- 1) There will be specific consequences to any of the aforementioned unacceptable behavior. Unacceptable behavior will be investigated and, if necessary, the appropriate punishment meted out.
- 2) Effective immediately, LMA will contractually obligate Sponsors to abide by this "conflict resolution" process as part of the sponsorship agreement. In effect, that by sponsoring LMA they agree to these rules of acceptable/professional behavior, and acknowledge the consequences for failing to abide by the agreed upon standards of acceptable behavior.
- 3) The consequence should act as a deterrent against future violations.
- 4) If any of the above or similar behavior occurs, a Sponsor may:
  - be required to forfeit membership for a specific period of time, if the Sponsor is a member of LMA
  - forfeit booth points,
  - have the right to participate in sponsorships suspended, or
  - some other punitive measure taken by LMA against the offending party.

LMA Responsibilities:

While fair and appropriate behavior of all Sponsors is necessary to the future of the organization, there is a reciprocal responsibility on the part of LMA to abide by certain parameters of appropriate behavior. LMA will abide by the following best practices:

- Communicate to all Sponsors equally and as simultaneously as possible all opportunities to sponsor, exhibit, underwrite, and advertise as they become available.
- Act thoughtfully and respectfully and solicit feedback from the Sponsor Relations Committee, as it represents the sponsor constituency when significant changes are being considered. This includes the terms or format of any sponsorship, exhibition, underwriting or advertising opportunity is being significantly changed or altered either in price or format. Adequate time should be allowed to gather and consider the responses to the feedback.
- Communicate to all Sponsors equally and with reasonable notice discounts or other changes in any of the above-mentioned opportunities.
- Identify an empowered decision maker for all of the above-mentioned events that can quickly respond to Sponsor questions and follow through on requests for information, and maintain current data.
- If one Sponsor has a grievance against another Sponsor, the process for launching a complaint is to submit, in writing, the complaint to the Executive Director of LMA. The Executive Director will likewise respond in writing within a reasonable time frame how the complaint will be addressed. The Executive Director may assign this responsibility to another party to review and resolve the issue. Appeals may be brought to the President of LMA and will be addressed on a case-by-case basis.
- As it pertains to the annual conference or any other LMA event where there is an exhibition hall, LMA should maximize traffic to booth areas by any or all of the following means: placing refreshments in booth areas or in locations that will drive traffic and increase traffic flow throughout the exhibition areas; have a booth area that is in a location that is the natural path to sessions; create additional reasons for attendees to visit the booth areas, such as raffles, bingo cards, etc.
- Give right of first refusal to any Sponsor, with a reasonable time deadline, for the equivalent sponsorship opportunity in the future for a time period to be negotiated between the two parties. It is suggested that this time period be a maximum of three years.
- Develop written procedures for prioritizing and assigning preferred situations, whether booth locations in exhibition halls, advertising locations, or any other situation when all sponsors can not be treated equally due to circumstances. Some of the criteria considered whenever allocating such things as booths or other placements should be a Sponsor's past participation and support of the organization (the Booth Point System was created with these in mind). Furthermore, we recommend that pricing be structured so that better booths or

messaging opportunities can be purchased at a clearly conveyed premium rate, but that preferred option for such premium space remain consistent with such already established equalizing mechanisms, such as the Booth Point System.

LMA commits to the following – wherever feasible:

- As it pertains to the exhibit hall at any national or regional LMA event, the layout of the exhibition hall cannot be altered in any fashion after booths have been purchased relying upon the layout.
- Discounts, rebates or other financial incentives may be offered to sponsors by LMA but such opportunities should be made available equally to all Sponsors.
- LMA should endeavor to identify clearly, when asked, the rationale for offering anyone what may be viewed by other Sponsors as “preferential treatment.” However, it is understood that details of any business arrangement between LMA and a Sponsor or supplier are confidential.
- Where a Sponsor’s right to participate in or sponsor an LMA initiative has been negatively impacted, LMA will enable the Sponsor to make an appeal to the National Board for reconsideration. It is understood that the window for making such an appeal may be severely limited, due to the nature of the project under way. That said, LMA will make every effort to ensure such an appeal can take place.

Dated: August 4, 2004