



Monday Monday

Connecting the Dots with Karen Kaplowitz



*Helping you create and reinforce the habits of successful career building,
gleaned from my work as a business development strategist, trainer and coach*

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The Art of Great Referrals. Do you automatically delete mass emails seeking recommendations for lawyers that do not relate to your own work? Are you disappointed when you are contacted personally about legal work that is outside your field? Every opportunity to refer work to other lawyers is a chance to help colleagues, to reward lawyers who have referred work to you, and to make new friends who may reciprocate. Responding effectively to requests for recommendations may also strengthen your relationship with the people who need a lawyer or are making an inquiry. Here are some guidelines on treating requests for referrals as the great assets they are:

- Find out the time sensitivity of the request and act accordingly. If a lawsuit has been filed and a party is looking for defense counsel, you have to act quickly.
- If it is not obvious, try to determine if you are the only lawyer who has been asked for recommendations. If you are, and the matter is substantial, consider making a commitment to helping the party find a lawyer so you keep more control over the pool of candidates.
- Be clear about the number of referrals you are being asked to provide. If you are asked for a slate of candidates, then provide multiple names. But giving out multiple names dilutes the value to the lawyers involved and dilutes the value to you in relationship building with those people. Making a single recommendation with a strong endorsement is a much more powerful referral and more likely to be valued by the recipient of the referral.
- Tell the lawyers to whom you have referred clients that you did so. Let them know if you have strongly endorsed them and also what you expect from them since your own reputation may be on the line.
- If you really want to insure the work gets to a particular lawyer, take more action, like arranging for the prospective client and lawyer to meet or speak by phone.
- If you don't have good candidates for referrals in mind, take the time to find the right people.
- Provide information with referrals, like past successes of the lawyers and how you know them.

Example: One of your partners called to ask you to recommend a lawyer in your specialty in a different part of the country for one of her clients. First, you explored whether you could handle the matter from a distance. The partner said that the client had already ruled that out. You then offered to actively help the client find a suitable lawyer. You asked your partner to tell the client you would call to get more information. Based on the circumstances, you identified several suitable lawyers you knew in the area. One had referred you a major matter and you were thrilled to have the opportunity to reciprocate. You provided the client with the name of the local lawyer with a strong recommendation about the local lawyer's experience and skill. You also told the client that you had several other possible lawyers if that one did not work out for any reason. You also shared with the lawyer you recommended that you had provided his name to the client. Your partner, the client, and the local lawyer were all impressed with your active support.

Are you treating requests for recommendations of other lawyers with sufficient urgency, attention and care?