



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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Referral Pipelines from Other Professionals. If one goal this year is to make business generation less random, building better referral pipelines from other professionals is a promising strategy. The best place to start is with professionals with whom you have worked on matters or from whom you have gotten previous referrals since those people already know you and trust you. The two best sources are non-lawyer professionals who serve similar clients and other lawyers, for the obvious reason that people ask them for referrals. To evaluate which other lawyers make the most sense, ask yourself:

- Is your strategy to find someone who does the same kind of work who routinely runs into conflicts, such as someone who defends companies and has to refer out individual defendants?
- Is your strategy to focus on a lawyer whose firm does different work than you do? If so, consider if you are likely to have occasion to refer people for their type of work.
- Is your strategy finding lawyers in your specialty that need to refer out matters which are too small or too big for their firm? Consider whether those matters would be appropriate for you.

To evaluate which non-lawyer professionals are attractive, ask yourself:

- Do they control their own client relationships so they are in a position to make referrals?
- Are they already tied into another lawyer or law firm that does the same work you do and supplies them with significant reciprocal business?
- Do you share common clients who can help you cement the relationship?
- Are you comfortable asking your clients to introduce you to their non-lawyer professionals if you have not met them in the ordinary course of your work together?

Once you have identified the best potential referral sources, make sure the people pass this test: are they people to whom you will be willing to refer work, too, since good pipelines are built on reciprocal relationships. To read more on this, see **[“The Care and Feeding of Referral Sources.”](#)**

Example: For years, a lawyer got a steady stream of great referrals from another firm and was always duly appreciative, sending good wine at Christmas and taking the referring professional and spouse to dinner at least once a year. The lawyer always got great results and reported on them to the referring professional. The fact that the lawyer never had occasion to refer work back did not seem to impair the relationship. Then the flow of work stopped. When the lawyer inquired, he found that he had been displaced by a firm which provided great reciprocal referrals. His friend said it pained her not to refer work but that she had to protect her own sources. The lawyer spent the rest of their lunch learning exactly what kind of work his friend valued most. He then systematically pursued other lawyers in his firm to whom he had referred work who could refer work back to his source. He finally found one who was willing to meet his source and try her out.

Are you foregoing or neglecting referrals from other professionals because you haven't figured out how to make them mutually beneficial? Can you use a three-way strategy to establish or refresh a great source?