



THE NEW ELLIS GROUP

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*

Volume 8, Issue 16

August 11, 2014

Referring Work to Other Professionals. Other professionals are a major source of referrals for many lawyers. There are many categories of other professionals to keep in mind as sources of potential referrals:

- Competitors who must make referrals when they cannot handle a matter because of a conflict;
- Competitors who have matters in which multiple parties require additional lawyers;
- Lawyers with different specialties;
- Lawyers whose firms' rates are higher or whose fee arrangements are less flexible than yours;
- Other types of professionals who serve the same types of clients you do such as accountants, financial advisors, consultants, recruiters, and expert witnesses.

There is no better way to cement your relationships with professionals who are potential sources of referrals than by referring work to them. Being in a position to refer work to other professionals will take some preparation on your part. Here is some of the ground work you need to consider:

- Make sure you understand what other professionals you know do. Ask them to explain what they do, who their clients are, and what kind of success they have had.
- Be direct that you plan to keep other professionals in mind for referrals. You might ask them to provide you with a few of their business cards so you have them on hand to provide to people.
- Whenever you hear that a client, another lawyer, or a friend needs a referral, immediately offer to help find an appropriate lawyer. For example, pay close attention to the emails circulated in your office requesting referrals. Getting the reputation of being a "go-to" person for referrals will increase your opportunities to make referrals.
- When you make a referral, always let the other professional know you have done so. If you cannot specify the name of the prospective client, describe the person and the nature of the matter so your being the source is obvious. You might also ask people to let you know if they hear from the people you have referred.
- If you receive referrals from other professionals and cannot reciprocate in kind, find other ways to thank them, such as featuring them in programs you organize.

Example: A lawyer was very impressed by her opponent on a matter; her opponent was very effective while remaining professional and cordial. After their matter concluded, she learned that her former opponent was leaving his big firm to open a practice on his own. When she congratulated him, her former opponent promptly asked if he could come by for coffee to get her advice on building his practice. She readily agreed to keep her former opponent in mind for conflicts or matters on which her firm was too expensive. She was pleased to refer matters to someone whose competence she could vouch for. Her former opponent was duly appreciative. A year later, she read a news item which mentioned that her former opponent was handling a major matter. She sent him a note congratulating him on landing such a plum assignment and offered her help if he needed additional troops. She was delighted when she got a call from her former opponent asking her to check conflicts and take a role on his team.

Are you systematically building reciprocal referral relationships with other professionals you admire?