



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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Building a Pipeline of New Business

The first question to ask when you are creating or updating your business plan is where does your work typically come from. You need to answer that question to look for more of the same and increase the odds of success. If your answer is that there is no predictability and it is purely random, look again. Here is a process for determining where your work has come from:

- Make a list of the major matters you have handled over the last three years.
- For each matter, identify the source of the work and how the source knew you or knew of you.
- Get in the habit of asking clients who call you how they heard of you. You need the information to thank people who referred people to you and to shape your strategic thinking.
- If your work comes from other lawyers in your firm, also ask them how they got the work.

Once you have identified where your work has come from, you are ready to consider how to increase the likelihood of similar sources. For example:

- If your best sources have been former clients, how effectively are you staying in touch with former clients? When you work with people in corporations, do you get their personal contact information or become LinkedIn with them so that you can stay in contact if they change jobs? Do you send them holiday cards? Do you invite them to firm events? Do you put them on relevant mailing lists? Do you make a point of reaching out to them personally periodically, at least once a year? Do you thank them every time they refer someone to you?
- If your best sources have been lawyers who do different work than you do, is there a pattern to what types of lawyers refer work to you? Do you look for opportunities to reciprocate in some fashion? Reciprocal referrals are best but there are other ways to reward your sources: <http://bit.ly/2EBQHiG>. Do you keep other lawyers who serve the same clients informed of your progress and results?
- If your best sources have been lawyers who are competitors, under what circumstances do they refer work? Conflicts of interest are great; clients who can't pay, not so great. Do you regularly convey to competitors that you are trustworthy, with a non-poaching policy?
- If some of your best sources are lawyers from other jurisdictions, have you identified and stayed in touch with lawyers you know elsewhere, like from law school, the ABA, or other associations?
- If former adversaries have referred work, what were the circumstances? Is their respect for you based just on your results or is it based in part on your professionalism?

Example: A lawyer was delighted when a law school classmate called about a client who had been sued in the lawyer's jurisdiction. But the lawyer was surprised because the classmate's firm had recently merged with a local firm and had the capacity to do the work. The classmate said that she had not met any of the lawyers in her firm's new office and would be more comfortable referring her client to someone for whom she could vouch personally. The lawyer said that he had a high regard for her new local partners and suggested one in particular. He offered to review the complaint and the assigned judge but assured his classmate she would be in good hands with one of her new colleagues. The classmate later reported that she really appreciated his help and had encouraged her new colleagues to keep him in mind for conflicts.

Are you ready to give up the idea that the sources of your work are too random for you to influence and to focus on a plan to create more pipelines like the ones that have worked in the past?