



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*

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Forging Networks Between Lawyers and Other Professionals

One strategy for building referral networks is to find other professionals who are themselves building professional practices and may have clients who need lawyers – and vice versa. Since reciprocity is key to a successful strategy to engage other professionals, start by asking these questions:

- In what circumstances have you or others in your firm had the opportunity to refer work to other professionals?
- Which circumstances are the most frequent?
- Which other professionals routinely need to refer their clients to lawyers?
- Have you started to develop relationships with other professionals who are involved with your client work or who serve the same or similar clients?
- Do you consider whether other professionals to whom you refer work are able to refer work back to you? Are they managing clients or client matters?
- Have some of the professionals with whom you have engaged or to whom you have referred clients made reciprocal referrals or offered to reciprocate?
- Which of the other professionals you know are actively building their practices? Which work in firms which provide support in planning joint activities with other professionals?

Some relationships with other professionals develop organically in the course of client work. Examples include forensic accountants working on litigation teams, valuation experts working on mergers, compensation and benefits professionals working on mergers, auditors working on IPOs, and jury consultants working on trial preparation. If you regularly work with other professionals on behalf of clients, it is worthwhile to consider whether forging an intentional strategy and agreement to attempt to refer work to one another makes sense.

Example: A woman partner in a law firm worked closely on a matter with a valuation expert from an accounting firm. The partner had recently joined her firm's new women's initiative committee. When their matter ended, the two women professionals met for lunch. The partner was impressed that the accounting firm had a very active women's initiative which routinely arranged networking events with law firms. The two professionals agreed to do several things. First, they agreed to organize another lunch to which each would invite one other person from each firm to explore what networking among the firms would make sense.

At their second lunch, the partner shared that she had reported on her positive experience with the valuation expert at a practice group meeting and another lawyer had asked for an introduction to the valuation expert. The valuation expert offered to propose to her accounting firm's women's initiative that they invite the law firm to a networking reception. They agreed that they wanted to keep the group small enough so that there would be time for each attendee to speak briefly about their work. They also agreed to circulate names and bios for each attendee in advance of the reception to facilitate each person's identification of the most interesting people from the other firm. The networking reception generated a lot of enthusiasm for more interaction between the two firms. The two groups decided to meet on a quarterly basis and to plan a substantive program to which they could also invite clients.

If you work with other professionals on behalf of your clients, have you structured a reciprocal business development strategy that would benefit both firms?