



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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## The Best Referrals Are Introductions, Not Referrals

Do you hedge your bets when clients or friends ask you to recommend another lawyer for work that is outside your specialty or your firm's? Do you provide them with a few names, information and contacts and recommend that they talk to each one before deciding? Are you reluctant to commit yourself to one hearty recommendation? Or are you trying to reinforce relationships with multiple people? There is nothing wrong with providing multiple referrals, but you might consider whether you would be better served by making one potent introduction instead of several noncommittal suggestions. Consider whether you are in one of these situations:

- In your professional judgment, there is one clear standout lawyer who fits the requirements. If you provide other names, do you at least have to say one stands out?
- You would like to reciprocate for a terrific referral you received from one lawyer who is qualified to do the work.
- It is more likely that your recommendation will be followed if you make just one introduction.
- Your contact is collecting recommendations from several people and yours will stand out more if you make just one powerful introduction.
- The person making the request has stated explicitly that they would prefer just one name.

Since we always hope that when we refer work to people that they will do the same for us, when you make a powerful introduction instead of offering a noncommittal variety of choices, you are also modeling the behavior you would like when you are on the receiving end of a referral from the people involved.

**Example:** A lawyer was pleased to get a call from a former client who needed help on a major matter even though the matter was outside the scope of her expertise or her firm's. She realized the strategic value of the opportunity to refer the former client to another lawyer. She told the former client that she would consider the options and get back to him by the close of business with names of other lawyers. Her list of referral possibilities included two lawyers who had referred matters to her and a third lawyer she knew who had a good reputation in the field, but with whom she did not have a strong relationship. She considered providing all three names to her former client but decided that would be a burden on her former client. Instead, she did some due diligence including review of the lawyers' bios and their firms' ratings. She concluded that all three had equivalent experience and track records. She selected the lawyer who had referred a significant matter to her and called him to ask how best to introduce him to the former client. She then provided detailed information about the recommended lawyer to the former client, and as the client requested, made an e-introduction to the recommended lawyer. Both the former client and the recommended lawyer were extremely grateful.

When asked for recommendations of lawyers in other specialties, are you willing to take the time to make informed judgments about who to refer and to make meaningful introductions of the other lawyers? Are you making introductions in the way you would like to have others introduce you to potential clients?