



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 3, Issue 20

October 12, 2009

The Care and Feeding of Referral Sources. People inside and outside your firm who refer clients to you are the lifeblood of your practice. Taking care of your referral sources is a top priority in any marketing plan. Here are the basics for every referral:

- Know who your sources are. Always ask people who call where they got your name, and keep track of the information.
- Thank people who refer clients, even colleagues. At a minimum, send a note. Preferably, call to thank them in person and gather data to help you reciprocate.
- Thank your sources whether or not the referrals lead to business. To maintain the referral flow, your message must be that all referrals are valued.
- Reciprocity in some fashion is essential. Giving back does not have to be in kind.
- Find out what your sources need from you, other than your doing a great job.
- If consistent with your ethical duties, let the source know the outcome of the referral: whether you took the matter and ultimately, how well the client did.
- If the source of the referral is another lawyer in your firm, ask specifically what reporting arrangement and involvement the other lawyer requires.

The goal of reciprocity is not only to reward your referral sources but also to stay top of mind so they think of you the next time, too. Try to reciprocate in ways that are valuable to the people involved. Do not assume you know what is valuable to them. Ask them:

- What kind of work are they doing?
- What kinds of clients would be of interest to them?
- How could you be of help to them, in business, or otherwise?

Example: You get a call from a prospective client who says he was referred by a former adversary. You respond that you feel complimented since the matter was hard fought and you have a high regard for the referring lawyer. But you ask why the client is not using the other lawyer, who would be equally well-qualified. You learn that the other firm has a conflict of interest.

You call the referring lawyer to thank him. You say that you appreciate his confidence in you, that the feelings are mutual and that you hope you will have a chance to reciprocate. You then invite him to speak with you on a panel for a local business group. You also email the other lawyers in your practice group, noting with pride the referral came from a former adversary, and ask them to help you find a conflict opportunity to refer back. You touch base with your old client, telling her that you thought of her when you got a referral from your former adversary. She is pleased to hear that you have the continuing respect of the opposing counsel on her matter. When you and your former adversary appear on the panel together, of course you banter about the fact that even though you are former adversaries, you were collaborative enough to appear together to speak and even to refer work to one another.

Are you taking care of your referral sources in ways which make them feel valued? When your sources are former adversaries, are you broadcasting to others, in a subtle way, your pride in getting the referrals?