



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 1, Issue 21

October 22, 2007

Taking the Initiative with Referrals. When other lawyers tell you they have referred work to you and you do not hear from the prospective new client, do you ever wonder what happened to the project? Instead of just chalking it up to bad luck, ask yourself whether you could have done something differently to help get the business in the door. Traditionally, professionals wait to be called about new business and of course there are ethics rules against “solicitation” of business from strangers. But once another lawyer has contacted you about referring a client who needs your legal help, you are not required to hang back and passively wait for the prospective client to call you. At a minimum, you are free to provide the referring attorney with information for his client about why you and your firm are suitable for the problem at hand. You are also free to request that the referring attorney introduce you directly to his or her client. By taking initiative, you are not only increasing the likelihood you will get the work, but you are also demonstrating to the referring lawyer that you will service his client with enthusiasm and reflect well on him for making the referral.

Example: On a Friday afternoon, a California lawyer emailed all the lawyers in his national firm for recommendations for a lawyer in Wisconsin to handle an injunction proceeding. A New York colleague sent back the name and contact information of a highly recommended Wisconsin trial lawyer and simultaneously informed the Wisconsin lawyer that she had been recommended. The referring lawyer in New York went one step further: he provided the Wisconsin lawyer with the name and contact information of the California lawyer in his firm who needed to file the injunction proceeding. The Wisconsin lawyer thanked the referring lawyer by email. A few days later, the referring lawyer asked the Wisconsin lawyer if she had gotten the matter. She replied: “I did not get a call.” What is wrong with this picture? The Wisconsin lawyer showed no sense of urgency and acted in a completely passive way. Would you hire a lawyer to handle an injunction proceeding if that lawyer did not even pick up the phone to follow up, at least to ask if she were appropriate and to check if her firm had conflicts?

If you have been disappointed by referrals that did not materialize, consider whether there are steps you can take to improve your odds, consistent, of course, with the rules of professional conduct in your state.