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Need Referrals? Don't Wait For A Fairy Godmother

Hands down, the single best way to get clients is to have them referred. Word-of-mouth marketing brings a potential client to an attorney, because someone he trusts has given him that lawyer's name.

The problem is that most attorneys handle the referral process in a haphazard manner. They don't develop the referral-generating skills or structures to create what is critical to client development: a referral system.

Think what would happen to a lawyer's practice if 20 people consistently sent him clients who pay on time, value his expertise, comply with his instructions and don't call with ridiculous questions on evenings or weekends. This list of top 20 referral sources would continually update as people move, retire, etc., and it would be priceless. But such lists don't get built by magic. Lawyers must work on it, in addition to being willing to develop those relationships.

The place to start is for the lawyer to have his assistant look through his files for the past year or two and identify the referral source for each client. Once the lawyer has the list, he can easily identify the A-list clients and circle the name of the person who sent them. Don't have 20 who have sent a significant number of clients? Most attorneys don't. But finding one, or three or seven provides a place to start.

Whatever the number of people on a lawyer's top-20 list, make sure to acknowledge them in some fashion on at least a quarterly basis. This could mean setting up lunch, sending a gift, inviting them to an event or participating in an activity that's of mutual interest. Remember, just because they've sent referrals in the past doesn't mean they will continue in the absence of a relationship that leads to top-of-mind awareness.

Building the rest of a top-20 list begins with identifying two kinds of people: those who

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service the kinds of clients a lawyer desires and those who are centers of influence (COIs) in the community and know the kinds of clients a lawyer services. For example, referrals for a real estate attorney can come from builders, bankers and mortgage lenders. Estate planning lawyers can look to certified public accountants and financial planners. Family lawyers can look to psychotherapists, priests and ministers, who are all good referral sources.

Once a lawyer identifies someone as a potential for the top-20 list, she must convert him to a referral source. Here's where it gets tricky: A lawyer must ask for referrals and do it in a way that is not pushy or in a manner reminiscent of a bad salesman. This is the place where many attorneys bog down and decide they hate marketing and don't want to do it. Don't think of the endeavor in terms of marketing. Think of it as building relationships.

For someone in the COI category with whom the lawyer does not already have a relationship, the lawyer should approach him by saying that he works with the lawyer's target market; can he share thoughts on how best to approach this group? Most people feel

complimented when others ask them to share their opinions, and they are glad to help.

After spending some time getting to know each other, ask some questions designed to unearth the top three frustrations the person experiences when referring a client to an attorney, or what has turned her off in the past about working with an attorney. Then listen carefully.

This also would be the time to find out how the person prefers to make a referral. Does she like setting up a meeting between the referred person and the attorney? Would she rather the attorney give the person a call and just use her name as a referral source? Or would she like to call or e-mail the person first to tell her the attorney will be calling?

This is the point in the conversation where many attorneys make one of several common errors. Saying something vague such as, "I'd really appreciate being kept in mind when you run into someone who could use my services" is not a direct statement asking for referrals. Letting the source leave without a follow-up plan is also a mistake. The key is to achieve control of the next step rather than being in the waiting position.

Learning to ask for referrals in a professional, non-pushy manner is a skill lawyers can learn. They don't need to be back-slapping extroverts nor do they have to change their basic communication styles. But they do need to ask. ■

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