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August 27, 2007

SIDEBAR

The care and feeding of referral sources

MARKETING

By Mark Powers and Shawn McNalis

Have you ever had a referral source just drop off the radar screen? Someone who used to send good cases, then stopped for some unknown reason? They haven't moved, died or changed how they do business, but the referrals just stopped coming?

With the growth in the number of lawyers over the last twenty years – 62,000 new attorneys graduating every year – competition for cases and referral sources is on the rise. If you haven't thought about how important it is to actively maintain valuable referral sources, maybe it's time you begin.

Take a moment to calculate the worth of your referral sources to your practice, not just over the course of a year, but over the lifetime of your practice. One good referral source can send thousands of dollars worth of business every year, and hundreds of thousands over the life of your practice.

This is important stuff. Eighty-percent of your referrals probably come from fewer than twenty people. It's likely your firm owes its existence to a handful of people who know you, like you and have faithfully sent you clients over the years. Unless you depend entirely on advertising, the very survival of your firm is tied to the continuing good will of these people.

Unfortunately, they're under no obligation to continue sending you business and can stop at anytime, for any reason – and no 30-day notice is required.

Given the delicate nature of this unspoken contract, it is wise to treat them well and find out what they're thinking once in awhile.

If referrals have dropped off, hope is not lost. If you haven't been proactive in cultivating your referral relationships, I recommend you do two things: First, schedule lunch with your referral sources to let them know how much you appreciate their ongoing support. Second, ask their opinions of your practice and how it serves the people they send. Think about it as informal focus group for improving your practice.

Let's start with the first suggestion. You can use your own words, or use ours. There are endless variations of this acknowledgement, but it's best to keep it simple and authentic:

Thank you for all your referrals. We really enjoy working with your clients.

Or

Thank you for sending us business – we really appreciate your faith and confidence in us.

Or

We appreciate your business and thank you for trusting us to work with your (clients, friends, family, etc.)

Now for the second suggestion: sitting down with referral sources to see how well you serve their clients. When coaching attorneys on how to become rainmakers, I ask them to interview 10 people who have referred them business in the past. I recommend they start with referral sources they feel more comfortable with, and use the first part of their conversation to reconnect and catch up. When the time is right to launch into the interview, they begin with some version of the following statements:

I'm always trying to improve the level of service we deliver to clients and I respect how you interact with your clients. I'd like to ask your opinion: What would you recommend I do to improve how I handle the clients you send?

Or

I really appreciate the fact that you send such great clients. Is there anything I can do to serve their needs better?

Or

I make a special effort to take care of the clients you send. What could I do to take better care of them?

Keep in mind you don't have to use these exact words. Just get your point across in a way that's comfortable for you. Though this may seem like a difficult conversation, most attorneys are generally surprised at how well it goes.

But think about it. Rarely can you go wrong thanking someone, then asking his or her opinion.

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In fact, the opinion-gathering part of the conversation proves useful for more than just gathering information. This exchange nurtures your relationship with your referral source. Better rapport and a new sense of familiarity are created from conversations like these. Your referral sources will come away complimented that you asked their opinion.

From the sources' perspective, it demonstrates that you care about them, and value what they think. It indicates you're paying attention to their needs, and most importantly, those of their clients. Clearly, you aren't taking their referrals for granted but recognize their importance to your success.

When you begin asking questions, your referral source may initially refuse to say anything specific, instead offering generalities such as, *You do a great job*, or *What you do now is just fine.* Press them gently by first asking more positive, open-ended questions, then move to more pointed ones:

In your opinion, what creates a positive experience for your clients?

What do you think we do well?

Could we improve on or add to any of those aspects of the client experience?

If that doesn't work, or you prefer another approach, say:

If you had one suggestion or one change in how we deal with the clients you send us, what would it be?

Or

What are a couple of things you'd suggest I do?

These kinds of open-ended questions will usually produce more of a response. Nine times out of 10 the referral source won't have anything substantially negative to say, but will be complimented you asked. It is of paramount importance, however, to refrain from a defensive posture if any negative comments are made. This will shut down the flow of information and indicate you weren't seriously interested in constructive suggestions. View any nuggets of information gleaned from the conversation, whether positive or negative, as very valuable and thank the person for his or her opinions.

Don't fall into the trap that one Atticus graduate did when he accused a referral source of having impossibly high standards. They are entitled to have standards. Always say you'll use their comments to enhance the level of service you provide their clients.

In addition to the feedback you get, this conversation may convince sources who refer work to several lawyers to direct more of that work to your firm. Why? Because you are out from behind your desk and sitting in front of your referral sources, connecting to them and reminding them that you are alive. Most of your competition is sitting back in their offices waiting for the client to come to them. Second, this conversation demonstrates you care about their clients and are sincerely interested in delivering a high level of service to them. It's generally a safe bet most of the other attorneys they send work to won't go to the same lengths. All else being equal, it gives you an edge over your competition.

The power of this strategic conversation lies in the unique advantage it creates – it sets you apart from your competition and increases the likelihood that when that referral source has a client to send, they'll think of you first. We call it "Top of Mind Awareness," and you won't get many referrals without it.

Test this theory for yourself. Schedule 10 interviews over the next few months to deepen your referral relationships and gather important feedback to enhance the service you deliver.

Bottom line: If you don't take good care of your referral sources, someone else will.

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