

The Legal Intelligencer

THE OLDEST LAW JOURNAL IN THE UNITED STATES 1843-2014

PHILADELPHIA, TUESDAY, JANUARY 28, 2014

VOL 249 • NO. 18

An **ALM** Publication

Give Your Referral Sources a Ton of Tender Loving Care

BY STACY WEST CLARK

Special to the Legal

A powerful radio station seems to be overtaking the airwaves and brainwaves. The name of the station is WIIFM. The call letters translate into “what’s in it for me” and all of us are listening to it 24/7. I am not saying that this is a bad thing—just that it is a reality and one that lawyers have to accept to properly market their services. Based on this reality, lawyers today need to market their practices by doing a lot of helpful things to others. You don’t have to sell, but you do have to give to get.

Here are some of my favorite things to do for your key referral sources. Because you need to touch referral sources in a way that is meaningful to them five to seven times over the course of a year to ensure they remember you, get started and calendar some of these items to do for them in the coming 12 months:

- Visit and learn what a great



STACY WEST CLARK

has been helping Pennsylvania lawyers and law firms expand their practices for 25 years. She is a former attorney with Morgan, Lewis & Bockius and

was its first marketing director. She is president of Stacy Clark Marketing LLC (www.stacyclarkmarketing.com).

client looks like to them so you can refer work back. Understand their practice and the kinds of cases they want more of in the future.

- Send them referrals.
- Use their services yourself. If possible, introduce them to your staff to use their services as well.
- Introduce them to contacts they wish to meet.
- Look for ways to promote their firm/practice in your own life.
- Nominate them for an award and let them know you did.
- Support their favorite charity—vocally, visibly and if possible, financially (but the first two are very important). Lend

staff and elbow grease if you cannot give large dollars.

- If you have gone through some cost-cutting exercises, share them with the client in case they can utilize the same ideas in their business.

- Interview them or include a quote from them in an article you are writing. You could even consider sharing a byline.

- Ask them to be on a panel with you.

- Invite them to join a group with you (association, hockey league, charity).

- Consider offering to review something of theirs (a contract, policy manual, etc.) for free. Do an audit.

- Entertain. Know their interests and passions. Become friends. Remember birthdays, kids’ names, etc. Invite a referring lawyer to your home for dinner and get to know each other’s families.

- Help them solve a problem on a nonlegal matter: search for new office space, admission to a club, etc.

- Start a relationship/friendship. Referral sources by and large love this—and it makes it much more difficult for another law firm to move in on your relationship.

- Keep the referral source squarely in the loop about the cases they sent you.

- Endorse their skills on LinkedIn and Avvo as appropriate.

- Introduce them to your team that will work on their referred cases. Make them feel part of the family/team.

- If your firm is employing advanced management programs to enhance revenues, offer to share them with the referral source to help their firm prosper as well.

- Share nonproprietary FAQs, checklists and forms to make them more efficient/effective.

- Send a congratulatory note to the referral source when they go on a board, publish, speak, win a case or enjoy any kind of personal or professional success. Read their bio, check in with their firm’s website, follow them on Google, LinkedIn and more—with an aim to learning news about them.

- Keep them apprised of your successes as well, so they will see you as tops in your field.

- As simple or silly as this seems, make sure every referrer has your phone numbers for during and after hours—as well as those of your staff who are involved with the representation. Do this in a formal way—rather than by assuming the client has this information.

- Thank the referral source for the privilege of helping their clients on a regular and formalized basis.

- Customize a CLE or other kind of training program for their firm—on the house.

If your firm is employing advanced management programs to enhance revenues, offer to share them with the referral source to help their firm prosper as well.

- Stay in touch when a matter ends. Call to check in—a month or so after. Send them useful news or developments by quick correspondence. Show them you are serious about being a business partner now and in the future and are keeping their needs front and center.

- Blog about your referral source’s great work.

- Call if something significant has happened in their lives. Commiserate if their favorite sports team lost.

- Create a list of your favorite things (your personal best restaurant, dry cleaners, movies, art exhibits, etc.) and send it to them.

- Sponsor a nonlegal educational event (how to use LinkedIn or a golf clinic) and invite them to it.

- “Gift” them in a personal way when they send you a case and

at special times during the year. (Not just at traditional holiday times—consider a “kick-off to summer” gift).

Oh and of course, do outstanding legal work for their client.

You can rock your referral source’s world. Now get going. Pick your three top referral sources and do at least two of the above ideas (or better ones you come up with) in the next 90 days. Let me know how it goes. I am rooting you on.