



Rainmaking 101: Referral Source Interview

By: Mark Powers & Shawn McNalis
Atticus, Inc.



Think about this: many of your referral sources are sending business to other attorneys in addition to what they send you. They may like you, but for whatever reason, they are spreading the work out to two or three other attorneys, so you only receive 30% or 50% of their work. In some cases, this is an appropriate allotment due to your limited areas of specialization – but in some cases the work is spread out due to other factors.

Unfortunately, they may never tell you about these other factors that influence to whom they'll send work. Perhaps your turn-around time is too slow. Or maybe you don't keep them informed well enough. It could be you haven't treated their referrals the way they think you should and they've gotten negative feedback about your office. Or maybe you take your referral sources for granted and haven't thanked them lately for the clients they send.

A great many attorneys make this same mistake: they ignore the substantial revenue that their referral sources provide and are caught off guard when one defects. Have you ever had a referral source just drop off the radar screen? Someone who used to send a lot of business, then stopped for some reason? They haven't moved, died or changed their business model and you don't know why the referrals just stopped.

Find out.

And don't wait until something negative happens. Here's more bad news: If you don't take very good care of your referral sources, someone else will. Competition for referral sources is on the increase. If you haven't thought about your referral sources as the valuable asset that they are, calculate their worth to you, not just over the course of one year, but over the lifetime of your practice. One good referral source can send many thousands of dollars worth of business, sometimes hundreds of thousands of dollars. If you want them to feel as important as they are, ask their

opinions on your practice and how it serves the people they send.

Interestingly enough, an opinion-gathering conversation like this is useful for far more than just gathering information. It builds rapport and intimacy. Why? Because, as with all of our strategic interviews, the individuals you ask questions of will come away complimented that you asked their opinions. From their perspective, it means you care about them, and value what they think. It signals that you are paying attention to their needs and those of their clients. It indicates you are not just taking their referrals for granted but recognize their importance to your success.

To try this for yourself, go out and interview three to five people who have referred you business in the past. Start out with the ones you are most comfortable with, just to get your feet wet. Then specifically target those you'd like to receive more business from in the future. Lead off the conversation with your version of the following statement:

"I admire and respect the way you do business (or, I'm always trying to improve the level of service to our clients) and I'd like to ask your opinion on something. Is there anything I can do to improve how I handle the clients you send me?"

The referral source may initially refuse to say anything negative in response to this question. Press them gently by asking first a more positive question, then moving to more pointed questions:

"OK. What do you think we do well?" Wait for the response, then, "Could we improve on any of those aspects of the practice?"

Then move to, "Is there anything you suggest I stop doing, or change completely, about how we deal with clients?"

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Alternately, “What are three things you’d suggest I could do better?”

It is of paramount importance that you not go into a defensive posture if any negative comments are made. This will shut down the flow of information and indicate that you really weren’t open to constructive suggestions. View any nuggets of information gleaned from the conversation, whether they be positive or negative, as very valuable and thank the person for their opinions. Don’t provide excuses, don’t accuse the referral source of having impossible standards, just thank them and say that you’ll use everything they mention to enhance the level of service you provide to clients. Nine times out of ten the referral source won’t have anything substantially negative to say, but will just be complimented that you’ve asked them. This conversation opens the door to more referrals from that referral source who could be spreading the work around to other attorneys. Why? Because you cared enough about their clients to ask these kinds of questions. And we guarantee you – most of the other attorneys they may be sending work to, do not.

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 think of you. We call it “Top Of Mind Awareness,” and you can’t succeed without it. Test this theory for yourself and schedule an interview as a client development experiment– what do you have to lose?

Mark Powers, President of Atticus, Inc., and Shawn McNalis, co-authored “The Making of a Rainmaker: An Ethical Approach to Marketing for Solo and Small Firm Practitioners,” and are featured marketing writers for Lawyers, USA and a number of other publications. To learn more about the work that Atticus does with attorneys or the Atticus Rainmakers™ program, please visit www.atticisonline.com or call 352-383-0490 or 888-644-0022.