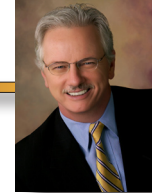




## Potential Referral Source Interviews

By: Mark Powers & Shawn McNalis



“What frustrates you about dealing with attorneys?”

Imagine asking this question of a potential referral source. Perhaps this is someone you met over the holidays at a party. First, he’ll grin -- look to see if you are serious -- and then he’ll tell you everything he doesn’t like about dealing with attorneys (even if he himself is an attorney). If you think this is a bad way to direct a conversation, read on. This type of interview question is one of the most powerful and strategic ways to cultivate a new business relationship and open the door to new referrals.

Keep in mind that second only to talking about ourselves; we humans love to give our opinions. Most individuals that you ask questions will be flattered that you asked. To test this for yourself, go out and interview three to five people who fall into this category. Most of us know approximately 150 people by name in our community. If you are well networked, or have lived in your area a long time, you might know more than 500. So look at the people with whom you are already acquainted. They may serve on the same boards as you. They may coach your daughter’s soccer team. They may go to church with you or play tennis with you on weekends.

Once you’ve identified them, think about what these people do for a living and ask yourself if they are in a position to refer you clients. If they are, try saying something like: “Gary, I’ve sat next to you on this board for a year now and I don’t really know what you do – why don’t we get together for lunch sometime?”

Or, perhaps you are at a service club meeting with someone whom you know casually, and admire the way she handles club business. In this case the conversation might start something like this. “Joan, I’ve watched how you’ve handled your committee – you obviously have pretty good business judgment. I’m always in the process of enhancing my practice and would appreciate your opinion. Could I buy you lunch and pick your brain?” These are just two examples: the idea is to create an opportunity to meet

someone one-on-one and get to know them better.

A one-on-one lunch, or even breakfast date, gives you that chance. The interview is not to be done when the relationship is still “cold,” meaning that you have to know the person you are talking to a lot better before launching into it. Only when the right degree of warmth is reached will you feel comfortable launching into the interview. So spend time learning about the potential referral source, their family, their history, and most importantly, their business. When the time is right, try to make the interview questions sound spontaneous and like a natural outgrowth of the conversation.

To lead into the interview, you might ask a question such as, “Have you worked with many attorneys?” or an observation such as, “I imagine you’ve worked with many attorneys over the years.” (You do not want to start the person on a long, detailed recital of whom they have used and what they do or don’t like about them. You aren’t looking for negative gossip about your colleagues and should avoid this perception by not letting them name people). To make it sound natural, use your own words when you ask the following questions:

1. What are your frustrations when dealing with lawyers, in general?
2. Why do these things frustrate you?
3. Tell me what lawyers have done in the past that made you decide never to go back to them -- or refer people to them. (Again, no names.)
4. If you were to get outstanding service from a lawyer, how would you describe it?

If you listen, your potential referral source will tell you what type of lawyer they enjoy working with and what type they do not. In this conversation, they will reveal the

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expectations they have of working with an attorney. And when they open up to you in this process they will start seeing you as an ally. Someone who understands. They will tell you things they are not revealing to any other attorney. Why? Because no other attorney in your community is asking these questions.

At the appropriate moment, mention to your lunch companion that you'd be interested in "building a business relationship with them in the future" and see what they say. Quite often, their response to this will be positive. If it is, pursue the idea. In most cases, if they are in a position to send clients to you, you are in a position to reciprocate. Mention that you will be on the lookout for referrals for them. In fact, there is nothing like sending a client to a new potential referral source to get the business relationship off to a strong start.

Take the time now to figure out who in your universe might have great potential to send clients. We've outlined a process you can use to begin cultivating a relationship with potential referral sources that is road-tested and very powerful. But don't take our word for it. Try it for yourself. We think you'll be delighted at the results.

*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.atticusonline.com](http://www.atticusonline.com) or call 352-383-0490 or 888-644-0022.*