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LEGAL MARKETING

Creating Sources for Referrals Can Be a Resource for Lawyers

BY STACY WEST CLARK

Special to the Legal

We have all seen the “Got Milk?” commercial. In the world of law firm marketing — the expression that rings true is “Got Referral Sources?”

Lawyers, bankers, brokers, planners, agents, accountants, clerks, clients, former clients, opposing counsel, judges, psychologists, engineers, friends and family members are just a few examples of professionals who can be great referral sources. For some lawyers, 100 percent of their practice is referral-based — for others not as much. Nevertheless, it goes without saying that any attorney’s marketing program should focus on the cultivation of key referral sources.

At a recent panel discussion sponsored by the Delaware Valley Law Firm Marketing Group, four lawyers from different firms and specialties discussed how they had succeeded in developing strong relationships with referrals sources. The panelists were Michael D. Ecker, Dilworth Paxson, corporate law; Jeffrey Lindy, Lindy & Associates, an officer of the Philadelphia Bar Association and former federal and state prosecutor; Lori Shemtob, Shemtob & Shemtob, a divorce and family lawyer, and former chairwoman of the Montgomery County family law section; and Kathleen Stephenson, Pepper Hamilton, chairwoman of the Philadelphia Bar Association probate and trust law section.

The following are their recommendations to both solo and mega firm lawyers on how to find and cultivate referral sources:

- Be active in something you really enjoy.

All of the panelists had one very important thing in common: They were all active in civic-, bar- or attorney-related organizations they were passionate about — and they participated in them at a very senior level. Their involvement in these organizations created ongoing opportunities to demonstrate their personality and professionalism to others who could send them business. That is one reason why the panelists all deliberately dedicated hundreds of hours to these extracurricular activities.

As a result, Shemtob, a former chairwoman of the Montgomery County Bar Association family law section and a fellow of the American Academy of Matrimonial Lawyers, receives regular referrals from her colleagues in the divorce bar in conflicts situations. She also gets referral work from nonfamily lawyers, psychologists, accountants and former clients.

Lindy, who has been active in the Philadelphia Bar Association for more than 15 years, reports that close to 100 percent of his work comes from former federal prosecutor colleagues who are now at large law firms and from referrals from other lawyers — particularly those he has met through his leadership activities with the Philadelphia Bar Association.

Stephenson of Pepper Hamilton finds speaking at PBI CLEs gives her the opportunity to master a complicated niche area — one that other practitioners may feel is too narrow for them to handle — thus triggering referrals to her.

The lesson here is two-fold. First, members of the bar are tremendous referrals sources. Second, no lawyer will cultivate a



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referral source in their office. Lawyers need to get out of their offices, get involved, lead committees, and head up efforts — and in doing so, put themselves in positions where they can rub elbows with others who can send them work.

- Treat opposing counsel well.

Opposing counsel can be a great referral source. This has been the case for several of the panelists. In his practice, Ecker has always striven to be courteous and deal with opposing counsel and their clients with great respect. His strategy has paid off — he gets referrals from these lawyers.

Stephenson echoed how important it is to treat opposing counsel well from a business-development standpoint. She explained that when she needs to refer a case out to another lawyer — where she will be working on the case — her first thought is “who do I want to work with?” Practicing what she preaches, at the conclusion of a case,

Stephenson calls opposing counsel to tell them it was great to work with them. A class call indeed!

- Make sure people know what you do.

The panelists agreed that lawyers today need to constantly spell out — with great specificity — the kinds of work they do to people they meet — including clients. Too often lawyers assume that their friends and even other lawyers they know — are aware of the array of areas they handle. However, the contrary is really true. Unless people are reminded on a constant basis (five to seven times in a year), they generally will not remember all the different things you do — and importantly, have you on “top of mind” status.

Lindy described how one of his oldest friends did not realize the kind of law he practiced, and they had been friends for years. Lindy had to specifically remind him that he handled criminal defense and commercial litigation matters. Shemtob told the story of how a client she was advising on custody matters asked for a referral for a “divorce” lawyer — not knowing she was a divorce lawyer. Now, when she meets with a client, she explains that she does “divorce work, division of assets, support, alimony, custody, prenuptial agreements, etc.” She actually says all the words. The lesson here is to tell clients, friends and colleagues what areas of law you handle. Otherwise, you may miss out on valuable work.

A handy tool to have ready is a concise and interesting answer to the question:

What do you do? Termed the 30-second elevator speech, Ecker is always ready to deliver a quick, concise and interesting description of his practice that invites further conversation.

- Keep your name in front of referrals sources.

Panelists agreed that just because someone has sent you a case does not mean they will do so again. You have to keep your name in front of referral sources (the experts tell us five to seven times a year) and repeatedly demonstrate to them that you are thinking about their practice or business. Ecker does this in a variety of ways, including regularly sending referrals sources articles on unique yet important topics that might affect their businesses. For example, he recently sent his clients and referral sources an article from the *Washington Post* about the new date for daylight savings time and how it will impact computers.

Lindy uses e-mail and occasionally handwritten notes to “reach out and touch” referral sources on a daily basis. Stephenson “advocates written notes of thanks” to referral sources, stating that things written on paper can become part of a file that the referral goes to in the future and sees her name yet again. Shemtob said that a thank-you phone call or note is a must. Technology can help. Microsoft Outlook can flag your contacts to remind you it is time to give them some form of personal attention or just check in.

- Ask for referrals.

The panelists agreed that lawyers needed to tell their referral sources that they want referrals. As Ecker put it, if you don’t ask, you don’t get!

- Thank-yous mean so much.

Hands down, this panel of experienced and longtime lawyers agreed that another way to get more work from a referral source is to send them work.

The second best thing to do is to thank them — and often. Lindy makes it a practice to immediately thank a referral source — even for the mere act of giving his name to a third party for consideration.

The panelists remember their referrals sources with generous gift baskets and unique gifts — and not just at holiday time. Some send referral sources gift certificates to fine Philadelphia restaurants throughout the year.

- Start building your network early.

Building a referral network is something every lawyer should do — no matter how long they have been practicing. New lawyers should be encouraged to schedule regular lunches with law school classmates and new contacts. As Stephenson said, “lawyers have to get into the habit of calling and meeting people” at the inception of their careers.

So now it is your turn. Be a good friend to your contacts. Stay in touch with them and think of ways to help them build their business. Be professional and thoughtful in your professional dealings. Ask for referrals. The results will follow. So, as I like to say, get up, get out and get going. •