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The Hottest Question Today: How Can I Stimulate Referrals Working Remotely?

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Special to the Legal

Yes. It is true. Lawyers today want to know how they can keep the pipelines open and working if they and their contacts are all working remotely. Without face-to-face lunches or breakfast or association gatherings, a lot of my clients are feeling lost as to how to stay on their referral sources' radars—and they also feel rudderless to find new referral sources.

Help is here.

The rules have not changed in terms of having a great referral relationship with other lawyers or third parties who send you work. We still live in a world with lots of “noise” with everyone trying to get each other’s attention. Inboxes are more inundated than ever. The key is to remember that (cover your kids’ ears) we still live in a “what’s in it for



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me world.” Therefore, a referral source will love you if you do great work for their client and are great to them.

Hmm. What does “being great to them” mean? It means you have to do something that inures to the personal or professional benefit of the referral source five to seven times in a year (at least). It is a job and definite responsibility.

So how do you begin?

Start now by making a short list of your five to 10 best referral sources over the last two to three years. Tape it to one side of your computer screen. Then pull out your calendar and schedule a date—every four weeks—to

consider what you can do for each of these individuals that inures to their personal or professional benefit. Ask your assistant to calendar the same dates so you can brainstorm as a team and you can get regular help with implementation.

So what could you do for each referral source who has already been good to you?

The following is from a larger list I give to clients which gets tailored to each lawyer’s goals. Before starting to come up with any ideas, it is imperative that you really think about the person and what makes them tick and what they might like or not. Get inside their head/life and do something that will have meaning to them. The success of this effort depends on personalization.

So here are some ideas:

Conduct “check-in Zoom calls” for the explicit purpose of seeing

their face and asking how he or she is, what is keeping them busy and what kinds of work and clients, customers or patients they are looking for. The conversation should be 80% about them and 20% spent on how you are doing and the kinds of clients/cases you are looking for.

- Nominate them for an award (legal or otherwise). There are so many places to do this—from business associations or local and national periodicals. Check out nomination instructions for Best Lawyers, Super Lawyers, The Legal Intelligencer and other ALM publications and of course the local business journal's best places to work, top CEO and CFO award opportunities. Nominate proudly and then let the referral source know that you have done so.

- Endorse their skills on LinkedIn.

- Share the referral source's postings on LinkedIn or their Twitter feeds with your connections. They will know that you have done so and be grateful for the exposure.

- Provide positive reviews on Google, Yelp and other places that matter to them.

- Provide a written recommendation on their LinkedIn profile.

- Introduce them to Groups on LinkedIn where they might find some useful information to help in their practice.

- Send them a client or customer. Or, offer to introduce them to someone you know that they have wanted to meet. (Ask them who they want to meet!)

- Co-author an article—where you do the lion's share of the work and give them a byline to insure they get some professional recognition.

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- Quote them as a source in an article you write.

- Right now, many organizations are looking for webinar moderators and presenters. Ask your referral source to serve on a panel or be a speaker you propose to one such organization or association.

- Share nonproprietary checklists, forms, FAQs that may help them in their work.

- Show the love. Yes, calendar his or her birthday and send greetings. It works!

- Be a good friend. If they are moving their home or business, offer to help or provide names of great moving services or organizers that could help them and lessen the stress.

Notice how none of these ideas have cost you any money! Now a few that have a minimal cost:

- Send them a magazine subscription to something of business or personal interest. I love how a magazine appears monthly and almost unconsciously makes you think of who gave you the subscription.

- Send them a gift card for meals at a local restaurant that delivers or does takeout. Everybody could use this right now!

- Gift them with virtual gifts like an exercise class, a wine-tasting Zoom party, or a class on masterclass (experts give advice from many different fields). Send any number of great books to them that will help them in business or personal growth.

How to add new referral sources to your business development arsenal:

- Start a formalized “Zoom group” of either law school classmates who don’t compete, college friends in different industries who are looking for new clients/customers or cross referrals and/or nonlegal folks you have used on cases like an accountant, an analyst, HR manager, real estate agent. Make this a monthly meeting with a set date and a formal “ask” requirement whereby each member must state the companies or places they want help getting in the door of from this group. For more on this, please see my last article in The Legal Intelligencer. Thanks to Michele Madera, the corporate immigration partner who is the subject of the article, who was kind enough to give everyone a blueprint for her (and now your) success.

- Join a LinkedIn virtual group and be active in it. There are thousands of them to choose from. Go to your profile and click Groups and search for one that fits your practice or passions. Select it, become a member and you will have free access right away to a virtual new network of professionals on LinkedIn to whom you can ask questions, answer questions and be a thought leader on an area of interest you share.

- Last helpful LinkedIn tip: (I own no stock in the company.) Go to the LinkedIn homepage of your college or law school. Click the Alumni tab. Put in the year of your graduation or some range of years. Presto—up will come all the alumni in that date range. It can be sorted by where they work, the industry, their geographic location, how you are connected and more. Then, reach out and make new connections with your classmates and discuss how you can help one another. Make an action plan for what to do each month.

- Get active in an association where your clients are members and scour the directory for other service providers. Reach out to one each month and discuss a plan for helping one another.

Typically, I ask my clients to start with the names of just three referral sources (of the five to 10 of the above-mentioned list they prepare) who they will check in on and touch in the next 30 days. We check in after that and review next steps for that referral source and calendar it to be done in the subsequent 30 days. And so forth so we are meeting and discussing a “next” touch regularly. Then, things happen. If you are willing to do the

work, you will see results start to occur.

It goes without saying that when you do receive a referral, be sure to send a handwritten (yes, not text or email) thank you note (followed by extremely a brief case status update if appropriate. Let them know you have hit the ground running for this new client. This will be appreciated.

Let’s get started. I am rooting for you! •