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LEGAL MARKETING

Marketing ‘Marriages’ Help You Get New Cases From New Referral Sources

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Special to the Legal

One of the things I love most about my work is the opportunity to introduce my clients to one another. It occurred to me one day, several years back, that I work with these terrific lawyers—most of whom are at small firms—and if they could meet each other—they could refer work to one another!

Shazam!

I put this into practice—and the introductions started, and the relationships started and new cases started coming in. You can do this too. Here’s how:

• **Have three lawyers on your personal referral bench for each practice area you don’t handle.**

I encourage my attorneys to have three lawyers on their referral bench for each practice area they or their firm do not handle. So, a real estate lawyer should have on her “bench” three family law attorneys, three intellectual property lawyers, three trusts and estates lawyers, etc. Three is a magic number because rather than giving a requesting



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client or friend the name of just one other lawyer, three lawyers will now be grateful that you gave their name out. Moreover, your requester will appreciate having choices.

If you have an open spot on your “bench,” it is time to fill it. Here are some options:

• Go through the alumni directory of your law school classmates and see who “owns” the practice area you seek.

• Go through bar association contacts you have made or ask the president for advice.

• Ask other members of your firm for recommendations.

• Ask one of your best clients or referral sources to give you a name of someone they think is outstanding in the field.

• Let me help you “get married” to another lawyer—who just happens to be one of my clients.

GETTING MARRIED

When I work with a lawyer who has spots open on his or her referral bench, I go through my list of current clients and look for matches that can be made. I have coined the phrase “make marriages.” In the past, I have “married” my intellectual property, corporate, family law, criminal defense, plaintiffs and defense employment lawyers, trust and estates lawyers, real estate, personal injury (and more) clients—with my other clients who have those spots available on their benches. It has been a total win-win for everyone.

I start by making introductions of my two clients to one another and after which they normally schedule a Zoom call to get things started. Let’s pretend you are one of my clients.

Here is your script:

“I am filling my referral bench and I need an outstanding cybersecurity lawyer on my team because I represent a great deal of small

to midsized family businesses who could have these kinds of problems down the road. Can you tell me about your cybersecurity practice and what a great client or case looks like to you so I can keep you ‘top of mind’ if I need to give out a referral?”

My cyber client then gushes about his practice and dream clients and then magic—100% of the time, he then turns the conversation to you saying something like, “Wow. I have done all the talking. So now, tell me about your practice and the kinds of clients and cases you are looking for!”

Now, it is your turn to talk specifically what you do well, the hot issues you are helping client with and the kinds of clients and cases you are looking for this year. When you are done, start asking questions again like “what do you like to do when not practicing; tell me about your family; how did you get into cybersecurity law?” The answers will be great marketing intelligence for your follow-up actions.

• **Help the “marriage” prosper via great follow-up actions.**

Once you have had this terrific introductory conversation, you still have work to do. Marketing is never about one-and-done activities. There is always a follow-up activity for each marketing endeavor. So here is what you do next to make this referral source think of you for work down the road. One conversation does not create a relationship.

My motto is “Give to Get.” Take out your calendar and sit down with your assistant and schedule a firm date each month, or every two

months, to do something that inures to the personal or professional benefit of your new referral source. It should be a date with an alarm on it for you to make a specific “touch” that helps the other lawyer in some way. So, for example, you might have learned that the cyber lawyer loves skiing when he or she is not working. Grab a copy of SKI magazine, fill out the very reasonable subscription card and send your new “friend” a year’s worth of great reading. Every month that issue arrives, they will think of you with a smile. Send the first issue with a handwritten note. Another idea might just be to check in each

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month and ask how things are or invite them to a webinar your firm is hosting or nominate them for an award of some kind, or endorse their skills on LinkedIn. You must religiously do something thoughtful to remain top-of-mind status with your new referral source.

• **Let’s make another marriage.**

Identify another practice area you need on your bench—say real estate. Do the things mentioned above, and look for someone like me, or a generous colleague at another firm or a

lawyer you admire and ask for the introduction you want. Then repeat the actions described above. This formula works if you do everything I have outlined.

And remember: Great marketing is a marathon—not a sprint. It involves doing something five to seven times a year for another person—to make sure they think of you for referrals. After you have dedicated time to the lawyers on your referral bench, keep doing you—credential yourself, lead, write, speak and keep practicing law at the highest levels with outstanding personal service to each client. I promise you—work will come your way. Let me know if I can play matchmaker for you!

I am always rooting for you! •