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MARKETING YOUR LAW PRACTICE
PART 4: DEVELOPING YOUR REFERRAL SOURCES

By Jan C. Gabrielson
Los Angeles

In previous episodes, I laid out some basics, then segued into how to meet new prospects through organizations and other means. But just meeting someone and handing out a card doesn't accomplish much. So let's explore how to turn the people you meet and those you already know into referral sources. I'll give you a simple system to manage your marketing efforts and move them along. Then we'll finish with some ways to condition yourself to spot marketing opportunities and take advantage of them.

What is marketing anyway?

Marketing is *communicating value to quality prospects*. To communicate value is to educate potential clients and referral sources about the value of your service. Although impersonal appeals such as advertising and mass mailings have their place in some practices, the best way to communicate with quality prospects and get the best clients remains personal contact. Few sophisticated shoppers for legal services find their lawyers by answering ads or responding to mailers.

It's who you know.

Start by taking an inventory of the people you already know—both business and social contacts. Then look at the list. How many qualify as possible prospects? How will you nurture those relationships and generate high-quality referrals?

Your social contacts can provide an excellent core of potential referral sources. Yet many lawyers resist looking to social contacts as sources of business for fear of contaminating the social relationship. But it's all a matter of how you do it. It's common and accepted in this country to ask people, including new acquaintances, what they do for a living. When they ask, tell them, and trust your judgment about how far to take it. It's one thing to disclose that you are a lawyer. It's quite another to corner a new acquaintance at a party and enumerate all the people they should sue.

In addition to your existing social and business contacts, consider groups you belong to, where the common bond of belonging to the same group will make people more open to your message.

Marketing out of school

One such group is former classmates and other fellow alumni, especially from college and law school. Classmates share a common bond with you, even if you didn't know them in school. Because of that bond, when they receive mail or email from you they will at least give your message a second look.

Find or create a list of your classmates and other fellow alumni. Some schools publish directories. If no directory is available, start a list from your yearbook if you have one. If you have no yearbook, start your list from memory and add to it as new people come to mind. Attend law-school alumni events, meet as many people as you can, and get their cards. Add them to your list. As you talk to classmates, other names will come up. Write down those names before you forget them. Evaluate your fellow undergrad alumni as prospects, taking into account where they live and work and the kind of work they do.

Clients beget clients

Don't forget your past and present clients. They know better than anyone what kind of work you do and how well you do it. If you treat them well, they will tell their friends how pleased they are with your representation. Although lawyers can't send everyone away happy, we can do much to leave our clients with the best possible impression. When the case is over, gently encourage them to refer their friends. I once saw a sign in a car wash: "If you are happy, tell everybody you know. If not, tell us." Try to convey that message.

Brief encounters

Remember to seize the many marketing opportunities that present themselves by chance. When you run into people you know, stop and say hello. Ask about them, and they will ask about you. Get their contact information.

Next steps

Once you have identified and made contact with potential referral sources, don't assume they will remember you months or years later when they have a client to refer. Stay in touch with them so they think of you at the critical moment. To do that, you need a system for keeping track of your prospects. The system should prompt you at each contact to decide on the next step and to actually take that step.

A simple system

If you are feeling that all this is too much to take on and keep up, start simple. Resist any impulse to plan a system so elaborate that it overwhelms you and protects you from actually having to do anything. Consider these ideas.

Label a folder "MARKETING," and keep it in your office within view and easy reach. Into that folder put notes on prospects, notes on marketing ideas, prospect lists,

information on prospects—anything related to your marketing effort. The folder gives you a central place to find your marketing materials without having to rummage around and lose momentum. More about your folder later.

Now start a prospect list, or even several lists. Possible lists: people you want to meet, people who already refer clients, and people who might refer clients but haven't yet. If you don't have a list to which you regularly add new prospects, you won't remember them when you are trying to recall good prospects. We tend to remember memorable people, not good prospects. Train your secretary to ask you when you come back from lunch if the person you had lunch with should go into your database.

In addition to putting names on a prospect list, you need a consistent way to track your interactions with each prospect. To meet this need, Kohn Communications has developed a Contact Management Form. Print this form from our website at <http://kohncommunications.com/tools/contactmgmt.htm>. On the first page near the bottom, are lines for notes on each contact with the prospect. On the line headed "Action," note your next step with this prospect. The heading on the Date column: "Do" is not misspelled. A *due* date just gets in line with every other deadline. A *do* date is more precise. Once you have decided the next step and when you will take that step, put it on the form and on your calendar. Treat it like any other appointment. If something comes up that prevents you from taking the action you had scheduled, it's OK to give yourself a continuance, but a continuance includes committing to a new date.

Also fill out Contact Management forms on people you expect to meet before you meet them. Starting the form will start you thinking about them as prospects.

Don't waste time or create an artificial obstacle by trying to set up the perfect database. If you don't already have a database program up and running, try Microsoft Outlook or your word-processing program. I say again: keep it simple.

Take the next step.

Before your referral sources will send you clients, you must earn their trust. Let them know that you are competent and reliable. But how?

Give value in advance. Offer to answer legal questions. Send useful information in manageable bites. If, for example, you specialize in bankruptcy, a summary of a bankruptcy case that affects real-estate transactions will interest real-estate lawyers.

Other things you do to build your reputation—teaching, publishing, and organization work—help position you to build the trust of your prospects. Referral sources can encourage potential clients to hire you by telling them that you are President of your bar association or that you sit pro tem in the local courts.

The next step on your Contact Management Form can be a phone call, an email, a letter, an invitation to an event or to lunch—whatever you are comfortable with, taking into account your relationship with that prospect.

Regarding lunch, if you take the time to have it anyway, use the time well by lunching with prospects. But since eating lunch with a prospect might take more time and energy than just grabbing a bite to eat, don't feel you have to do it every day. Find a level of activity that works for you. Lunch need not be just a twosome. Consider inviting another compatible person who might also benefit from the contact. For example, if you plan to have lunch with a business lawyer, invite an accountant to join you. They might be good prospects for each other as well as for you, and they will appreciate your having gotten them together.

Be grateful unto them.

Build trust by showing appreciation. When your marketing pays off and someone refers you a potential client, send a thank-you note where appropriate. Don't feel compelled to send a thank-you note for every call you get, or you will spend too much good time thanking people for bad referrals. But you should acknowledge a potential client referred by a source that you have been romancing. Similarly, a referral that might appear high quality to someone outside your field merits a note, even if you don't accept the case. Often, well-intentioned people refer you clients who look good to them, but not to you.

The marketing mind

As you learn to market, you will develop a new way of looking at the world and the people you meet. We call this mind-set *the marketing mind*. Here is a practical and effective way to nurture that new world view, one that takes less time and energy than you might think.

Each morning, before you look at your mail, email, faxes, or phone messages, spend five minutes with your marketing folder. Then, as you maneuver through the day, your mind will go to work on your marketing challenges. Consciously or subconsciously, you will respond differently to the day's events. For example, when you are walking alone to lunch and see someone you know, you might stop and talk to that person and evaluate her as a prospect. Before, you might have walked on by and missed this opportunity.

Your marketing mind will also prompt you to look critically at why you do what you do. You'll ask "Is this worthwhile?" "Should I try something else?" You'll also notice and evaluate every marketing message, every brochure, every call. Does it work? What about it is effective? Does it turn you off? Why? Does it grab your attention? Does it inspire your respect? Does it build your trust? What can you learn from it that you can use? Developing a marketing mind can help you get clarity on your marketing goals and to better judge where to focus your efforts.

Some of you may be thinking that it sounds mercenary to go into social situations with marketing on one's mind. Maybe so, but marketing done right helps us develop good social relationships, as it stimulates us to go out and meet people and get to know them. It can also be a stimulus to growth. I offer myself as an example. When I first entered practice, I was not especially outgoing with new people. As a result of seeking out new people who might refer me clients, I learned to appreciate prospects as enjoyable people. I expanded my social circle and came to look forward to meetings, conventions, and parties as social occasions, whether or not they offered potential referrals.

Next time: your mailing list—who goes on it, what to send, how often, and whatever my marketing mind cooks up between now and then.

Jan

Jan C. Gabrielson is a past president of the Century City Bar Association. This article is adapted from an article in his column in the State Bar's Family Law News. You can contact him at jan@kohncommunications.com.