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3 Steps to Building a Referral Partnership Network

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Why are referrals so important? You already know that referred clients tend to be your highest quality clients, but they are also the most affordable to obtain. These clients typically walk through your door pre-sold on your services and expertise and off the bat they come in with a much higher level of trust and respect. Additionally, referred clients are much more likely to pay on time and refer others to your firm in the future.

There is no question that referrals are marketing gold for law firms and because of this, it makes sense to invest time and money into [generating a process](#) that not only encourages these referrals but fosters them as well. If you can create a referral-based firm, you can worry less down the road about how to market and sell your services.

Why Do Most Lawyers Have a Hard Time Generating Referrals?

Building a steady stream of referrals takes consistency and it takes persistence. Attorneys are busy and dedicating their time to these efforts is not always at the top of their priority list. For most firms, referrals are incredibly important, however, there are no systems in place to ensure successful word of mouth.

Steps to Generating Referrals

Providing [outstanding service](#) to your clients is certainly the first step in creating a referral-based firm. But you must also regularly and consistently cultivate these referral relationships. There are methods that can be put in place to encourage this referral process and it begins with identifying professionals who are interested in passing along referrals before you invest the time in relationship-building.

Step 1

Setting Appointments

Begin this process by generating a list of around 50 local professionals. This should include roughly 75% attorneys in complementary specialties and 25% non-attorneys with clients whose needs may overlap services. It's important to remember that other attorneys and firms are also looking to build referral-based practices, so use that to your advantage!

Consider professionals in these industries:

- Bankruptcy: Debt counselors
- Business: CPAs
- Criminal: Mental health professionals, rehab centers
- Estates: Financial planners
- Family: Marriage counselors, family therapists
- Injury: Chiropractors, physical therapists, doctors
- Social Security Disability: Chiropractors, mental health professionals.

This list is a great place to start, but you know your clients and your firm best. No one is more equipped than you are to identify the fields of professionals that you believe are best suited to leverage a referral relationship with.

When you begin to build out this list, the easiest way to start is to create an excel sheet that details as much information as you can find on each of your 50 contacts. Start by pinpointing the geographic location you want to target, the practice area or clients they serve, and then do a little digging about what their website looks like. How do they market themselves, are they running a lot of ads? Do they have any associated publicity? What do their Google [reviews](#) look like? These indicators will give you a better sense of how they are marketing their firm.

These businesses are who you want to reach out to first because if they're putting a significant amount of marketing dollars into their firm, they are likely bringing in a steady stream of leads. This means they have more potential referrals to send your way. It is important to take the time to vet these contacts to ensure you're reaching out to the appropriate firms. Your time is valuable so don't waste it!

Delegate Initial Outreach

As an attorney, it is best practice for you to handle or be involved with the first potential referral source call. As much personalized follow-up, you can provide is ideal, but the most long-lasting referral relationships are forged by attorneys who make that initial effort and cultivate trust. But with that being said, the other aspects that come before and after the initial call can be delegated. The creation of your contact list, for example, can be delegated to another member of your team. Setting up the initial appointment call can be handled by someone else on your team, and so on so forth. Having access to a [shared calendar](#) where you can seamlessly view your team's schedule will be critical to set these appointments in the most efficient way possible.

Phone, Not Mail

Contrary to some recommendations, picking up the phone and calling potential partners is far more effective for setting an initial appointment than postal letters. With postal letters, you're not only waiting a few days for the recipient to receive the letter, but you also have to set up a game plan for once the letter is received. We are not saying to avoid snail mail entirely, but the return on investment for phone calls far outweighs that of physical mail. Not to mention it is significantly faster.

Once you start calling your list of prospective referral sources, ask to speak directly with the attorney or professional. If you do not get through or are stopped by a gatekeeper, ask for an email address and leave a voicemail.

You should be spending about 2 hours of work for each appointment you set. So what does this mean? This means you will spend a decent amount of time on the phone trying to connect and learn more about the professionals and their businesses in your surrounding area. Some specialties and practice areas will naturally be tougher than others, so don't get discouraged if the outcomes aren't materializing how you thought they would. Two referral appointments, or 4 hours of work, is a good target to aim for each month. At this rate, you will build a very robust network. Check out the attached referral partner appointment request script if you need some help getting started!

Step 2

The Initial Conversation

Once you book that first appointment, you may be asking yourself, "Well now what? What do I say?"

Remember this quote by Epictetus: We have two ears and one mouth so that we can listen twice as much as we speak.

During your initial referral partner call, stick to the general 80/20 rule. You should be listening 80% of the time and speaking the remaining 20%. Start by asking about the attorney/professional and show curiosity about their practice. Ask how it started, that they focus on, who their ideal client is, and keep the first half of the call focused on them. Additionally, take this opportunity to learn as many personal things as you can so that you may build a connection and foster a relationship!

Once you compile all this information, concisely give some details about your firm, but don't go overboard! This conversation should be about them.

Step 3

Cultivation

Engaging your new partners is crucial. These new budding referral relationships need to be cultivated, they need to be nurtured. To engage these partners, start with a give. Add value right away, and then stay in regular contact.

You should certainly be engaging them before your first conversation and after as well. Consider sharing resources like a blog, white paper, or even current events articles. This will not only demonstrate your willingness to help that firm or practice but also to show your engagement and genuine interest in their business. Newsletters are also a great way to stay top of mind for your referral sources. Not to mention they can also double as content you send your current clients as well. Maintain a nice mix of content that is both legal-focused, general industry topics, and lifestyle content.

The bottom line is that you need to be consistently providing value so that you're thought of when these businesses have potential clients to send your way.

Occasionally, attorneys won't seek referral partners because they feel like they don't have enough cross-referrals to provide. There are other ways to provide reciprocal value than exchanging one-for-one referrals. If you can't always return a referral with one of your own, think of other ways

your firm can provide value to them. Maybe it's collaborating on publicity or [marketing](#) campaigns, co-promotions, or spotlights in your content and newsletters.

Additionally, if you are sent a client, consider sending that referral partner a note every other week to let them know their referral is in good hands and that you're taking care of them. It is very important that the businesses you work with trust that you're providing good services, otherwise they will not send you prospects.

The Takeaway

Building referral relationships are crucial for your business. They are also no-brainers. If you can leverage your community to help grow your book of business that is absolutely what you should dedicate some of your time to doing. Utilize these steps and take the leap!

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