

OPTIMIZING YOUR REFERRALS



Making referrals to other attorneys is a frequent task for busy attorneys. Whether the referrals are for the purpose of conflicts, special expertise, or local presence, every referral puts an attorney's reputation at risk. Moreover, it often can put a client relationship at risk. Making consistently good referral choices therefore becomes important for top attorneys.

For many attorneys, choosing the right referral source is based on past firsthand experience, or – failing that – the proverbial “does anyone know?” email to colleagues. Recognizing the institutional inefficiency of the latter approach, some firms are using customer relationship management systems, such as InterAction, to identify potential candidates for a given referral need. And, of course, one can always resort to conducting an online search to identify other potential candidates.

The real challenge is not finding potential referral options; it is

finding the right option. The right referral is the one that will serve your client or relationship well, thereby enhancing your reputation. Three key factors in making the right choice can be easily remembered as the three C's of optimizing referrals.

- **COMPETENCE:** This is the bare minimum requirement in making any referral. Fortunately, there are a plethora of easily accessible rating systems that can substantiate what you know about the competence of a given attorney in a specific area. Of course, some ratings are more credible than others. But, using a mosaic of one's experience coupled with presence across leading rating systems can provide useful guidance as to competency when one doesn't have firsthand experience. Of course, one needs to be evaluating the attorney(s) who will be actually doing the referred work.

- **COST EFFECTIVENESS:** The best technical job performed in other than a cost-effective manner can leave your client very disillusioned with your referral. Cost effectiveness obviously involves more than just the billing rate of the referred lawyer. Cost effectiveness is ultimately a function of the billing rate, the strategy and tactics utilized by the referred attorney, and the intelligent use of support professionals.

- **CLIENT CARE:** Presumably you want your client to be served as well as you serve them. You will want to make sure that referred matters are not treated as second-class matters. Firms whose primary business is referred matters can be more likely to provide assurance that your referred client will get a level of service equal to that of the best clients at the referral firm.

Each of these factors is vitally important. If any one element is missing in the client experience, your client is likely to be disappointed with your referral.

In a world where many attorneys feel significant pressure to originate business, it can be tempting to make the hope of return business the key to the referral decision. Not only is that problematic vis-à-vis one's client, but it ignores the truism that seldom is the value of potential business worth nearly as much as seeing to it that one's existing clients and relationships are well served. Using the three C's is a handy way to maximize the likelihood that is one is making the right referral choices on a consistent basis. ☺



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