



ADVANCED REFERRAL MARKETING FOR ATTORNEYS.

Deck link: http://bit.ly/dcbar_referrals_2021

Hi

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DEFINITIONS

- **Referral:** A response to a request.
 - Hopefully pre-qualified lead, but not guaranteed
 - Still, often best quality source of new clients
 - True referrals ≠ paid lead gen (not semantics)
- **Growth:** More work than you have now.
 - Not to be confused with business *refinement*
- **Strategy:** A plan of action(s) you set out to control, tied to a goal.
 - **Growth strategy:** A plan tied to the goal increasing business
 - Considering here, increased business = more clients, but could be more revenue per client, more billable hours per time period, etc.



Referrals: Who has **control**?

Three main controlling types (where true referrals come from):

- **Individuals** (friends & family, past clients)
- **Concentrated-control businesses** (individuals, operating as a biz → SMB)
 - Other solo/small-firm lawyers (1:1 & network groups)
 - Non-legal industry (financial planners, IT consultant)
- **Distributed-control businesses**
 - Bar assns
 - Marketplaces, networks (organic, not paid)

... **And: you!**



Success factors by control type: Friends & Family

Factor	Higher likelihood	Lower likelihood
Age	Older	Younger
Location	Near	Far
Closeness / presence of mind	High interaction, presence of mind	Low interaction, presence of mind
Network	Large (Dad's the mayor)	Small (home body)
Understanding	Deep knowledge of practice	Limited knowledge of practice
Comfort level (incl. bias)	Low bias concern	High bias concern



62 percent

People looking for a lawyer who ask friends & family for recommendations

25 NPS

Most clients actually wouldn't recommend their lawyer to friends or family.



Success factors by control type: Clients

Factor	Higher likelihood	Lower likelihood
Frequency (or <i>network saturation</i>)	Estate in 40s, Immigration	Worker rights, PI
Location	Real estate purchase (NY)	“No-fault divorce” (CA)
Population	Beverly Hills, CA	Fairbanks, AK
Need	Criminal defense (manslaughter)	Personal injury (broken foot)
Sentiment	IP (winning!)	Pre-nup (sucks)
Comfort level (disclosure of personal details)	Divorce in 60s	DUI in 30s



Success factors by control type: Solo/Small-Firm Lawyers

Factor	Higher likelihood	Lower likelihood
Frequency (or <i>network saturation</i>)	Estate in 40s, Immigration	Worker rights, PI
Population	Beverly Hills, CA	Fairbanks, AK
Referral Rules (as of Jan. 2019)	Monetization OK (Illinois)	Monetization NOT OK (Vermont)
Network	Large	Small
Comfort level (familiarity, confidence, time in industry)	High comfort (law school bud)	Low comfort (bar assn event encounters)
Intentionality (character trait)	Proactive	Passive/Inactive
Reciprocation (Golden Rule)	High reciprocity	Low reciprocity
GP-to-Specialized ratio (related to population)	High specialization	Low specialization



Success factors by control type: Non-lawyer solos/SMBs

Factor	Higher likelihood	Lower likelihood
Population	Beverly Hills, CA	Fairbanks, AK
Network	Large	Small
Comfort level (familiarity, confidence, time in industry)	High comfort (long-time relationship)	Low comfort (distant)
Intentionality (character trait)	Proactive	Passive/Inactive
Reciprocation (Golden Rule)	High reciprocity	Low reciprocity
Relevance to work (client overlap)	Estate lawyer <> financial planner; Bankruptcy lawyer <> accountant; PI attorney <> general contractor	Medicare lawyer <> kindergarten teacher



Success factors by control type: Distributed-Control Businesses

Factor	Higher likelihood	Lower likelihood
Referral Rules (as of Jan. 2019)	Monetization OK (Illinois)	Monetization NOT OK (Vermont)
Network	Large	Small
Engagement	Active	Inactive
Information	Well informed	Poorly informed
Relevance	Current, regularly updated	Old info, seldom updated
Revenue generation	Opt-in, paid	Perk, unpaid



Success factors by control type: You

Factor	Higher likelihood	Lower likelihood
Frequency (or <i>network saturation</i>)	Estate in 40s, Immigration	Worker rights, PI
Population	Beverly Hills, CA	Fairbanks, AK
Referral Rules (as of Jan. 2019)	Monetization OK (Illinois)	Monetization NOT OK (Vermont)
Network	Large	Small
Intentionality (character trait)	Proactive	Passive/Inactive
Reciprocation (Golden Rule)	High reciprocity	Low reciprocity
GP-to-Specialized ratio (related to population)	High specialization	Low specialization
Capacity	High	Low
Effort (presence of barriers)	Low (access to online calendar)	High (long response times)



What this means

- Many factors at play; this is just a small sample
- Many factors are **external**

What to do:

- **Within referrals:** Control what you can, as it's relevant and practical
- **Beyond referrals:** Stabilize growth with a balanced portfolio
 - Targeted, predictable, affordable, controlled

Referrals: Increase control, formalize a program

Devise a growth strategy that incorporates a referral program. Components of that plan may include defining:

- **Players**
 - Who, expectations (type of leads, frequency)
- **Payments**
 - Allowed? See state bar's rules. If so, to whom, how, and how much.
- **Systems & services**
 - Who operates? Who has access (e.g., to online calendar)?
- **Communications**
 - To whom, how, and how often (requests, practice “news & updates”, etc.)
 - Referred client SLA (e.g., are referred clients treated differently, as VIPs?)
- **Tracking & measurements**
 - Goals & objectives (new clients, but also new referrers?)
 - Benchmarks, check points, and targets
 - Quantitative but also qualitative
 - Analysis and revisions

Be more **strategic** with referrals

1. **Evaluate** best referrers → identify similarities → increase referrals from *within* existing network & *expand* referral network with similar partners
2. **Share** updates about your firm with your referrers / network → stay relevant and top of mind. Not just about incentives.
3. **Reciprocate!** Golden rule. Passive revenue source, or at least community goodwill.
 - Can outsource: Give list to assistant/receptionist → saves time, increases responsiveness.
 - Explain what you do before referring out.
 - Anyone could be a future client or know one! A great referral might even get you a positive review for that “service” alone.
 - Post to your website as resource (proactive, reduces interruptions) → track clicks

Growth portfolio: expansion considerations & resource management

2 of 3 potential clients

People who say their “decision to hire” is most influenced by an attorney’s responsiveness to their first call or email.

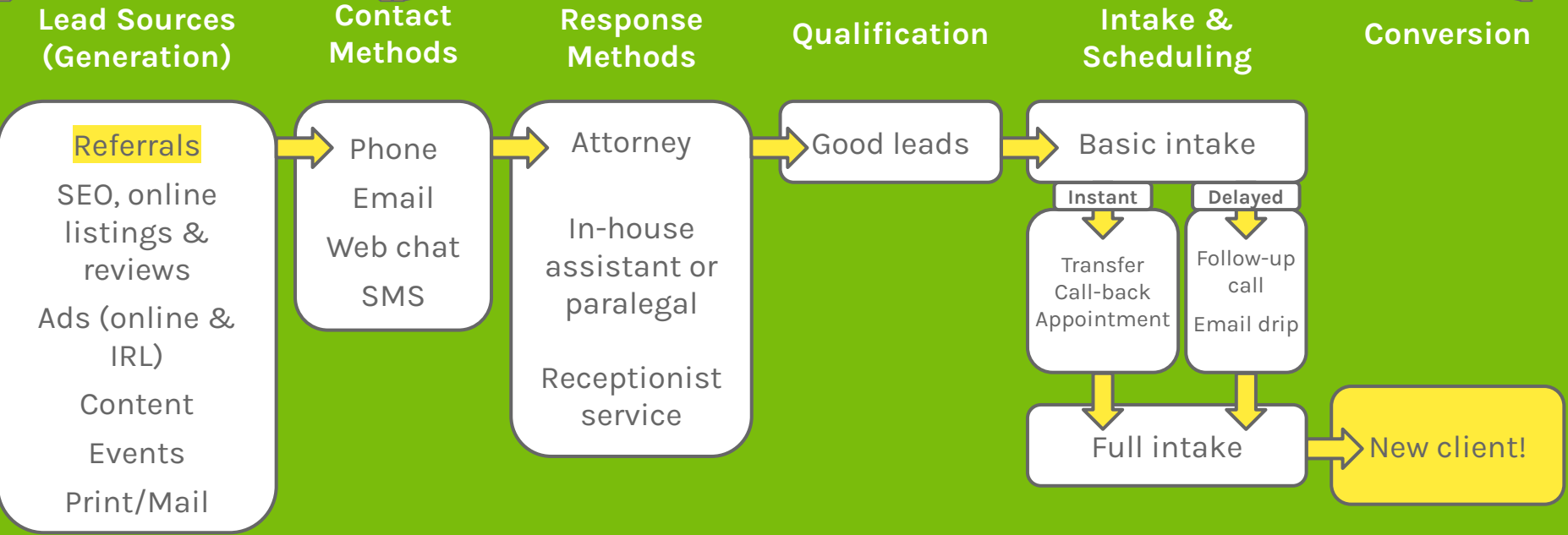
59 percent

People, on average, who didn't hire an attorney even after a consult.

NEW CLIENT CONVERSION FLOW

GENERATE

CAPTURE



Level-Up Your **Lead Lines**

1. Review ~20 best & worst clients of last year
 - Identify common traits, incl. where they found you
2. Reduce/eliminate “bad” lead sources.
3. Define criteria to better screen leads.
4. Increase resources to good lead sources (time, energy, money)
 - o Time: Responding to positive reviews online
 - o Energy: Networking events. Nurture relationships with best leads.
 - o Money: Paid search ads for keywords driving best new clients
5. Respond promptly! **#1 decision factor** for new clients, referrals or not. Outsource this (at least initial call/chat/screening).

GET IN TOUCH

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