

Legal Marketing: Six Keys to Becoming a Recognized Expert-Fifth in a Series: Building Relationships with Strategic Referral Sources

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Disclaimer: When I use the word “expert” or “specialist” in this series, I’m not talking in the legal or ethical sense, but in the marketing sense where the goal is to get media and/or prospects to perceive you as an expert or specialist.

The fifth legal marketing strategy for building credibility and becoming a recognized expert is **Building Relationships with Strategic Referral Sources**

Strategic referral sources are people who already have a relationship with the people you want as clients. For example, if you target small business owners, you would look for those who already have a relationship with small business owners. These could be accountants, financial planners, chamber of commerce, community leaders, local bankers, CPA’s, commercial real estate agents, payroll processing companies, the list goes on and on with people who have relationships with small business owners. So how do you build a referral network with them?



One of our clients sends out a letter to 75-80 targeted professionals that basically says:

“Hello, I’m Attorney Jack Smith with XYZ Law Firm. We know that competition for professional service advisors is getting more and more intense with more people entering the field. We are building a cross referral network with other trusted advisors who are experts in their field. Over the last 15 years we’ve been practicing law, we have really focused our practice on working with small business owners and high net worth individuals on estate planning, wills and trusts and asset protection. Through a series of breakfast meetings and private meetings at our office, we’re going to build a cross referral network with a limited number of other professionals who are committed to growing their practice and sending cross referrals. We’re not looking for any kind of a fee for facilitating this network, but we would like to officially invite you to check it out and see if this is something you’d like to support. For more information, give us a call at this number or visit our website to learn more about our practice.”

From this mailing, our client got a group of about 25 going. They get together about once a month and send cross referrals to each other.

Existing clients are also a good source for you and your referral partners. If you partner with a CPA or financial planner, each of you would send a letter out to your respective client databases offering a free consultation on behalf of the other as an added benefit of being a valued client.

Co-sponsoring an event or a seminar series is another excellent way to build relationships with strategic referral partners. Technology makes it easy and inexpensive for an attorney and another professional to host a webinar or teleseminar on topics of interest to small business owners.

Your local bank branch is another source waiting to be tapped. Banks generally have a generous local marketing budget, and frequently don't know what to do with it. Offer your services as an expert speaker for a small business seminar that the bank could host – they do all the work in setting it up and getting an audience. You now have a room full of prospective clients and all you had to spend was some time preparing your remarks.

Professionals are always looking for good strategic referral partners. You can ensure that you're a good partner by educating them about who you are, what you do, the kind of clients you target and the great service you provide. Reciprocity is the key: to get referrals, you have to give them, too.

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Stephen Fairley is a nationally recognized law firm marketing expert and has helped more than 6,000 attorneys from hundreds of law firms across the country to discover the secrets of generating more referrals and filling their practice.

He is the international best-selling author of 10 books and 5 audio programs.

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