

Asking Clients for Referrals:

A missed opportunity?

By Donna Erickson

Attorneys often neglect to ask current clients for referrals, thereby missing an opportunity. While deciding whom to ask and when and how to raise the question requires some careful thought, treating a client as a potential source of referrals can produce multiple benefits.



Without a doubt, clients can be your best source of referrals. Yet in my 20 years of marketing work with lawyers, I have met few who actually ask clients for referrals.

Some may believe that their clients will automatically refer business to them if the opportunity should arise and, therefore, there is no need for the lawyer to ask. Others may be reluctant to ask a client for fear that the client would say no because they may not have been completely satisfied with some aspect of the lawyer's handling of their case.

If you want to increase your business, get in the habit of asking your clients for referrals. In addition to identifying new prospects who may come your way, asking clients for referrals will also be good for your ongoing client relationships. Stop and think for a minute. If you know that you will be asking the client for referrals at the end of the engagement, subconsciously you may be more focused on your relationship with the client, their satisfaction with your work, and how service is delivered. It could spark the drive within you to go the extra mile. After all, your business is all about relationships.

Whom to Ask

Once you decide to ask clients for referrals, it's important to know whom to ask and when. You should not automatically ask every client. First, for each client you are considering, you must think about the experience the client had working with you and how long they worked with you. If they would rate you highly in terms of results and service, they should be added to the list. Don't ask any client who may have a reason to question your performance, or that of the firm.

Once you have your list of individuals, rank them in order of those you feel you know the best or have known for a long time. It will be easier for you to get started by having the conversation with those who make you feel most comfortable.

When to Ask

The best time to ask a client for a referral is at the successful conclusion of an engagement. Always ask when you are alone with the client; never in a group setting. Don't have this conversation over the telephone.

How to Ask

You should have a conversation that enables you to ask for the referral and describe the type of clients you would like to work with, or the type of work you would like to do. Take your time and be specific in what you are asking. If you are a business lawyer, you might say, "I would appreciate it if you would keep me in mind if you are talking with colleagues who are considering changing legal counsel." Follow this statement with more detail on your practice and

how you believe you could assist the types of persons they may be in a position to refer to you.

Continue the conversation by discussing other services provided by the firm. Something like, "My colleagues and I serve as a team of resources. We work together for our clients who may need assistance in other areas like real estate, employment law, or resolving disputes. In addition to working with businesses, our firm has been helping individuals and families to protect their rights for the last __ years. We do will and estate planning to help people protect their assets for retirement and plan for their children's future. We also help with adoptions, divorce or custody disputes, and when people are injured in accidents or by defective products."

If your practice is consumer-oriented, such as family law, you might say, "I would appreciate it if you would consider recommending me to your friends or relatives who may need help with family issues."

Say Thank You

Always remember to say "thank you" for any referrals the client sends your way, whether they materialize or not. Send them a handwritten thank-you note. If they believe you appreciate the referral, they are more likely to continue to send prospects your way.

Don't Disappoint!

When a client places their trust in you and sends someone your way, be sure that you are the top of your game and are providing excellent service to your clients. All referral sources, whether they are clients or other professionals, want to feel confident that when they refer someone to you, you will handle the matter with great care and a commitment to excellent service. They want to look good to the referral and not later regret having sent them to you. Focus on the key factors of service excellence.

Asking clients to send referrals your way can deliver dividends for years to come. Don't overlook this no-cost, easy-to-implement opportunity to expand your practice.

Reprinted, with permission, from Bench & Bar of Minnesota, a publication of the Minnesota State Bar Association.



Donna Erickson is the president of Erickson Marketing, Inc., a marketing consulting firm working exclusively with law firms. She has 20 years of hands-on experience developing and implementing effective marketing initiatives. She is a past president of the Legal Marketing Association's Minnesota chapter and for 10 years served as the director of business development and marketing for Briggs and Morgan, P.A. She can be reached at Donna@EricksonMarketingInc.com.