AM I A REFERABLE LAWYER?

Brenda Geiger

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BRENDA GEIGER

ATTORNEY & ADJUNCT PRACTICE ADVISOR

- Brenda Geiger is the founder and CEO of Geiger Law Office, P.C., a trusts and estate planning law firm. The firm has helped over 4,000 families through innovative estate and asset protection strategies
- She is a sought-after speaker, Atticus coach and attorney on a variety of business, estate and asset protection topics
- She has authored 7 books on various legal topics related to estate planning and actively markets to allied professionals to build strong referral relationships

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ABOUT US

We help lawyers grow great practices and cultivate great lives

INTENTION

Help you get more great clients!

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MORE THAN JUST BEING GREAT AT THE LAW

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THE GROWTH CORNERSTONES™

REVENUE, INCOME, CONTROL, FREEDOM AND IMPACT

Sharpen Focus & Prioritize

Attract High-Value Clients

Build a Great Team

Increase Profitability & Cashflow

LEGAL SKILLS

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What is the most important thing you want out this workshop?

AGENDA

- Proven strategies of how to get started on immediately getting more great cases
- Understanding The Atticus Referral Development Process™ and where you can start
- Work on what to say and when to say it
- How to work on your **ask** so its ethical, comfortable, and effective
- Leave with a 10-step action plan

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“An ounce of action is worth a ton of theory.”
– Friedrich Engels

WHY DO YOU WANT REFERRED CLIENTS?

- Value per case is higher
- Less acquisition cost over time
- Less “sales” involved because prospect is “pre-sold”
- The referral sources are like an “endless annuity” for your practice
- Makes it difficult to unseat you as the dominate player
- Price/fees are less of an issue
- You get the three rebuttable presumptions

THE THREE REBUTTABLE PRESUMPTIONS OF A REFERRED CLIENT

1. You are honest
2. You are fair
3. You are competent

WHY DON'T LAWYERS STRATEGICALLY, CONSISTENTLY BUILD REFERRAL RELATIONSHIPS?

- Time-we are time starved
- Skills-I don't know how to
- It's not easy and it's uncomfortable…(terrifying for some of us)
- Not sure what to say or how to ask…haven't developed the basic skills
- Don't want to be perceived as a "salesperson"
- Afraid of looking desperate

MARKETING TO OTHER LAWYERS: THE 10 FEARS OF MARKETING TO LAWYERS

1. They will know more than me
2. They will think I am a fraud
3. They are too busy
4. I don't have the time
5. They will send me awful clients
6. They will steal my great clients
7. They will steal my great referral sources
8. I won't know what to say to them
9. They will not like me
10. I will not like them

10 ADVANTAGES OF MARKETING TO ATTORNEYS

- You have credibility. They know what it takes to practice law
- Loyal. Once you earn their trust, and attention, you really must mess up to get rid of them
- They are always looking to expand and upgrade their clients, so they appreciate new referrals too
- Lots of grace on customer service issues-they think their client are overly demanding too
- They have their own referral network of other professionals, i.e., CPA, Financial advisors
- They know other lawyers they trust so you can meet those lawyers too
- Their referrals are presold, often prequalified, and usually A plus cases
- The great ones will watch your back and not throw you under the bus
- They may need your services
- They are just as scared of you as you are of them…and they don't like other lawyers either
- Bonus-you make a friend of a referral colleague, and sometimes they upgrade to being a great friend and lifetime referral source

Cultivating a Referral Portfolio™

THE SURFACE OF A VERY DEEP POOL: CULTIVATING YOUR REFERRAL SOURCE PORTFOLIO

Proactive versus reactive

Understanding what a referable lawyer looks like

-practice area demographic is key

-client versus professional referral sources

Appreciating it is a long-term game of mutual support

-referring out

-helping out

-looking out

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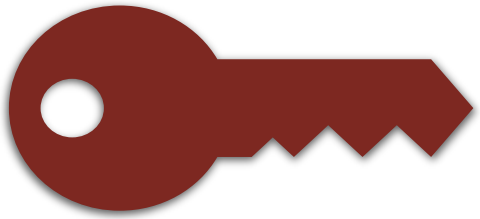
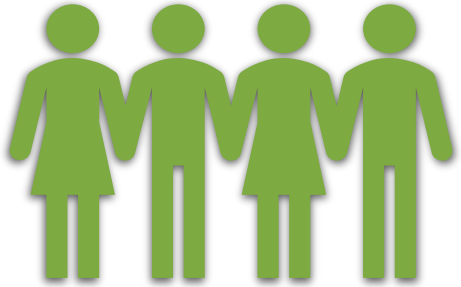
WHAT IS A REFERRAL PORTFOLIO™?



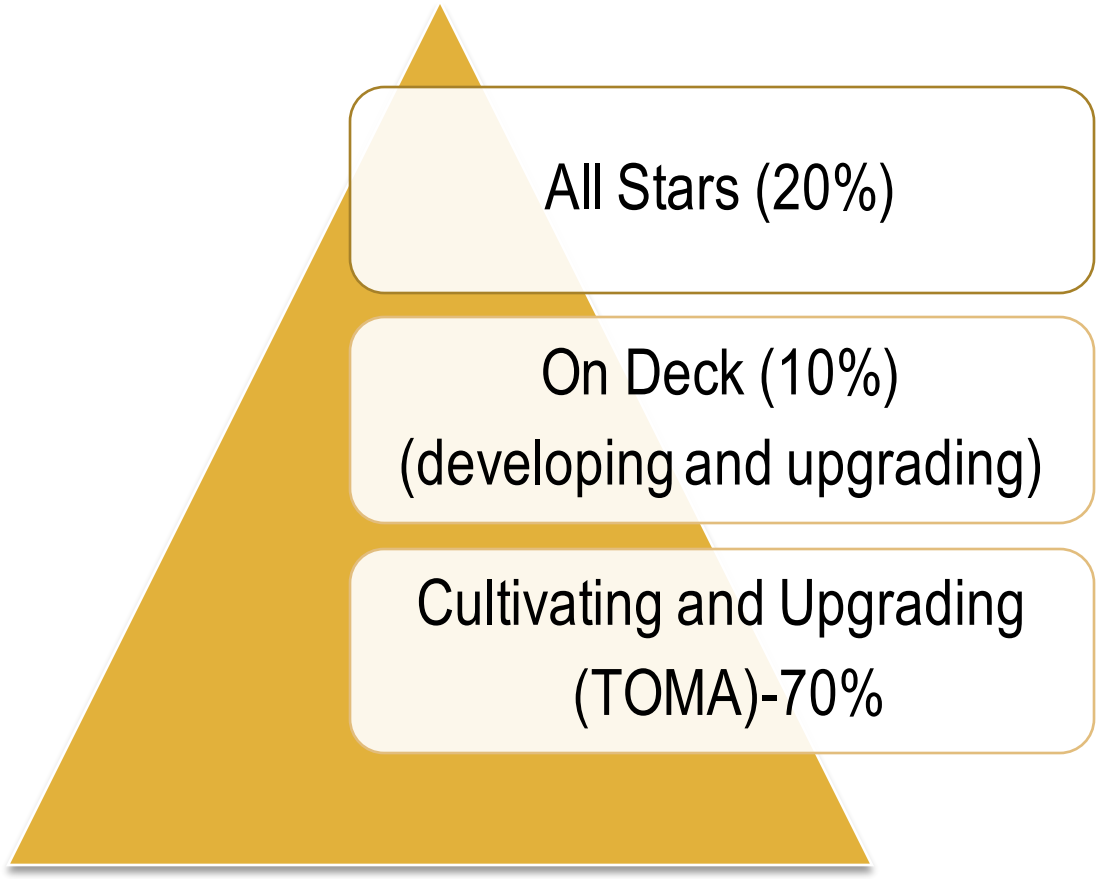
The key is building up a "referral community"



These are people who help you find GREAT clients at the right price point

Don't panic! We will get there a step at a time

A REFERRAL PORTFOLIO™ QUICK SNAPSHOT



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A Referral Source Portfolio is:

- A systematic process for building relationships with key referral sources and clients
- All marketing actions are to be consistent with personal beliefs and interests
- The intention is to attract high value clients on a predictable basis

SUGGESTIONS

- Be open
- Be patient with yourself
- Think of this as the master strategy in your marketing program
- Nothing will pay greater dividends over time
- It will require investment but, with practice and patience, it will pay off like nothing else
- Make it a win-win
- Look for ways you can help your referral source

STRATEGY 1: UNDERSTANDING YOU ARE CREATING A SUSTAINABLE EVERGREEN PROCESS

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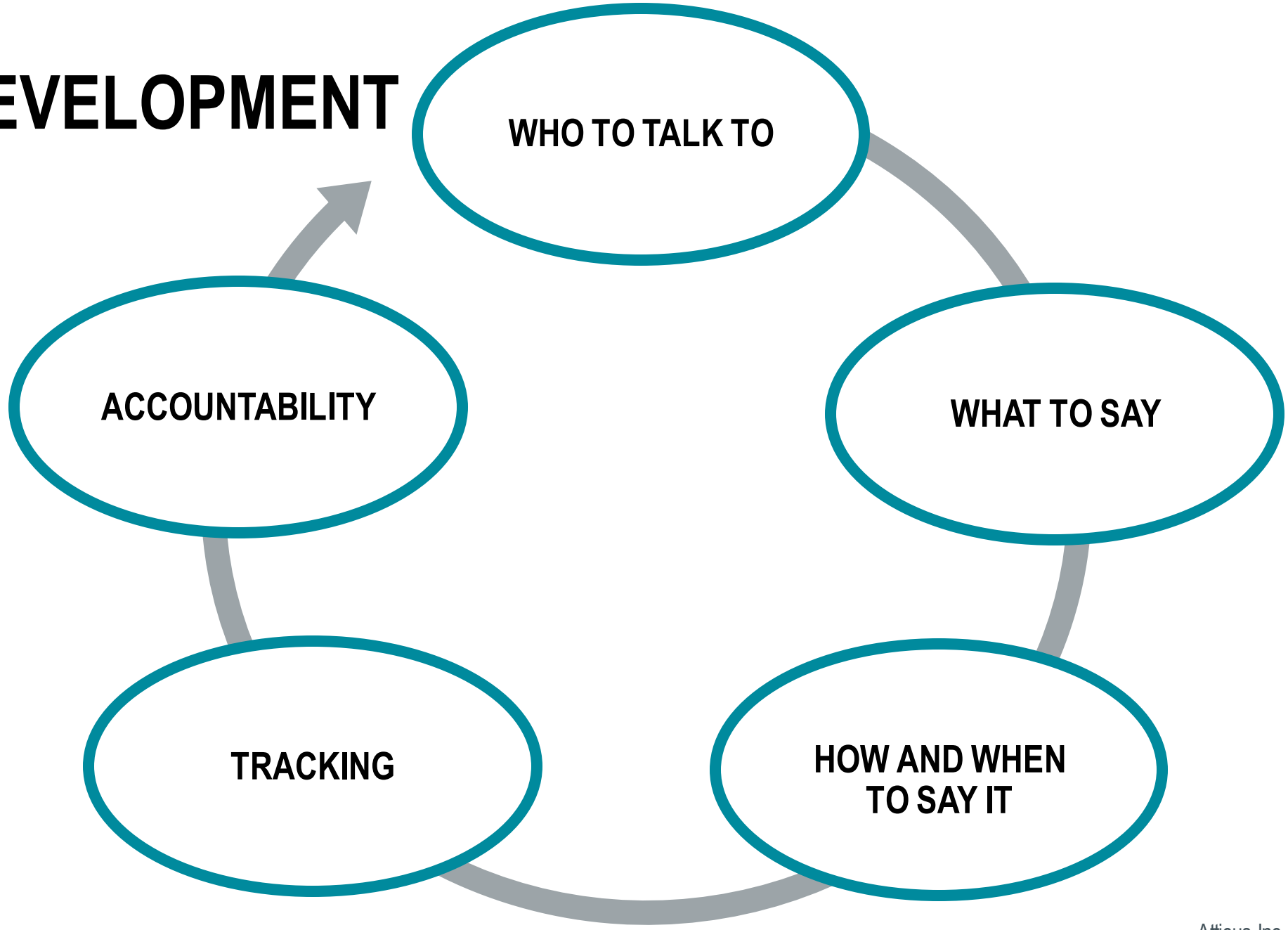
THE ATTICUS REFERRAL DEVELOPMENT PROCESS™



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STRATEGY 2: MEASURING, TRACKING AND BENCHMARKING SO WE CAN LEARN

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MEASURE AND GOAL SETTING

- How many referrals per month are you currently receiving?
  - Are you tracking your prospects? (weekly or monthly)
  - By the person
  - By the type-past client, attorney, professional, etc.
- Do you know how many great referral sources you have currently?
- How many marketing contacts per week?
- Measuring your progress
  - The Referable Lawyer Scorecard™: Basics-self assessment

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The Referable Lawyer Scorecard: Basics™

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Name: _____ Date: _____

Criteria	Reactive 1	Frustrated 2	Maintaining 3	Proactive 4	Strategic 5	Prior	Now	+/-
Mindset	What matters is I am a great lawyer, and my clients like me. My referral process should not matter. What matters is I am a smart lawyer and people should just know that and should send me great cases.	I know I need to get better cases and clients. I am not sure how to do it and where to start. I see something that I need to change or fix then I get distracted by client work. I might be stuck. My cash flow is inconsistent.	I am doing okay. I am consistent on my referral marketing efforts. I have a minimum of 3 marketing contacts each week. I think I don't have market until cash flow gets tight.	I have goals, a plan and am working with my team to improve our referral base. We are consistent in our asks and making progress on our process. My consistent marketing produces consistent cash.	My team and I know our process. We are building a strong Referral Portfolio™. We know what to say and when to say it, and we ask for business. I am turning away good cases and only taking great cases.			
My Plan	I don't have written plan or goals. I have some mushy thoughts that occasionally spill out, but I don't have a plan. Besides, people should know to refer work to me because I am good.	I have a written set of goals. But I am not moving forward. Something is missing. I feel overwhelmed and I am not sure what to do to get things moving. I need help.	I am making slow and steady progress. We have at least 20 great referral sources that send us good prospects.	My team and I are committed to building a large Referral Portfolio™. We are getting great cases and referring great work to others. Growth is consistent.	Everyone in the firm is aware of our plan and focused on excellent service. Everyone knows how to support the referrals. Trifecta referrals are common. My competitors are annoyed.			
Attitude	I am really a great lawyer-just ask me to tell you how amazing I am. I am smart and I am good. People should just know to send me work. I don't understand how some of my dumb friends are getting so much work.	I am not sure how to approach this whole referral marketing thing. Some days I think I've got it other days I am just confused. I think my attitude about it might be in the way. I feel like I take one step forward and two steps backwards. Maybe advertising on the internet is the way to go.	I am learning it is not about just getting business in the door. At the core of this is an attitude of helping others grow, solving problems and collaborating to help our clients (and each other)	I am here to help. I am committed to helping my clients, referral sources and collaborative growth partners. If I can't solve the problem or issue, there is someone in my Referral Portfolio™ who can.	I love my practice and my Referral Portfolio™ community. It seems like every day working with extraordinary referral sources, clients and team gives my life meaning, purpose and a great practice. I have a great practice and a great life.			
Who to talk to and what to say	I don't need to talk to anyone or know what to say because I am good. Everyone should just know that I am good. Everyone should just know what I do and send me great case because I am so good.	I know who to talk to, but I am not sure exactly what to say. Plus, I am not sure how to figure out if they are a potentially good referral source. I don't know how to tell them what a great client looks like to me.	I know who to talk to and what to say. I have a decent amount of referral sources. I know I could use more great referral sources but I am on cruise control	I am consistently adding more relationships to my Referral Portfolio™. I know who is the right fit and who is a "no" very quickly. I know who is a "great" referral partner and I am looking for them.	My entire team knows what a great referral partner looks like, how to talk to them, and how to support them in helping us with new clients. It is amazing to have everyone working together bring in great clients.			
How and When to say it	I just need to let people know I am a great lawyer and give them my business card. My reputation speaks for itself. They should just know that since I am great, I should be the only option they turn to for legal help.	I am learning that perhaps how and what I say is not making a lot of sense. Just telling someone I am a lawyer is insufficient. I need to talk more about who I help and how we help them. The burden to communicate is on me!	I am making progress. I know what to say and how to say it. I am just not getting out there enough because I am too busy with work.	I know what to say and how to say it, and it connects to those I talk to about it. I am getting traction and a reputation for helping clients with these issues. My message is connecting with prospects.	My entire team knows who we help, how we help, and knows where and when to share our message. Our top clients and referral sources refer high caliber prospects who are in alignment with our ideal client.			
Ask	I got no time for this type of stuff. It is silly. I am a great lawyer and I do not have ask for anything. People should just know I am great, and they would be stupid not to know just to come to me for legal help.	I am inconsistent. Sometimes I have the courage to go for it, other times I get scared. I know my 'ask' is a practiced skill but I just don't feel confident yet in using it, so I feel clumsy and awkward when I do.	I am consistent with my ask. I realize for me to get great clients I need to describe what a great client looks like and how I can help them. When I do this, I get great clients. It is working.	I have several different ways to ask for business, referrals and introductions depending on where I am at and what I am doing. It is getting kind of fun and it is getting me some great work.	My entire team follows my lead. We understand that the key to getting great clients is building a client centric process. Our 'ask' is heartfelt, eloquent, and impactful because at its core is an offer to help.			
Follow up and tracking	I don't have time to follow up and track. I am way to busy doing legal stuff. I am very important and exceptionally busy. If people don't want to work with me it is their loss.	I am struggling with some elements of tracking and follow up. I think my systems for tracking prospects and following up with them along with my referral sources are weak. It needs improvement but I am not sure where to start.	I am tracking my prospects. I can tell you who sends what kind of cases. I know who my best referral sources are by the numbers not by my feelings.	My firm has a process to track each lead. We have a fantastic follow up process to either move the prospect forward or to politely say no.	Tracking and follow up is a precise and honored process. It tells us what is working or not working about our entire referral marketing process. We would be blind without these processes.			
Learning	I am learning every day how to be a great lawyer and that is the only thing that really matters. The smarter I am at being a lawyer the more money I make. I may have to work more but it is worth it.	I am realizing being a great lawyer is just the beginning. To really create an exceptional client experience there is so much more I can do to make an impact. I need to work on my business skills to grow beyond my basic lawyer abilities.	I am improving my skills and processes around referrals. Occasionally I commit more time and effort to learning how to do it better. I am so much better than my friends at this.	My focus on my business skills is a competitive advantage. None of my competitors are looking at or studying how to improve their practices just their skills as lawyer. The more I work on the business the more we grow.	Our entire team is committed to being better than we were yesterday. The heart of our firm is the client experience. We don't just have a Referral Portfolio™ but more of a monopoly. Our top referral sources and clients tell everyone we are the "go to" firm.			
					TOTAL	0	0	0

Top 3 Insights

Top 3 Actions

STRATEGY 3:
WHO TO TALK TO

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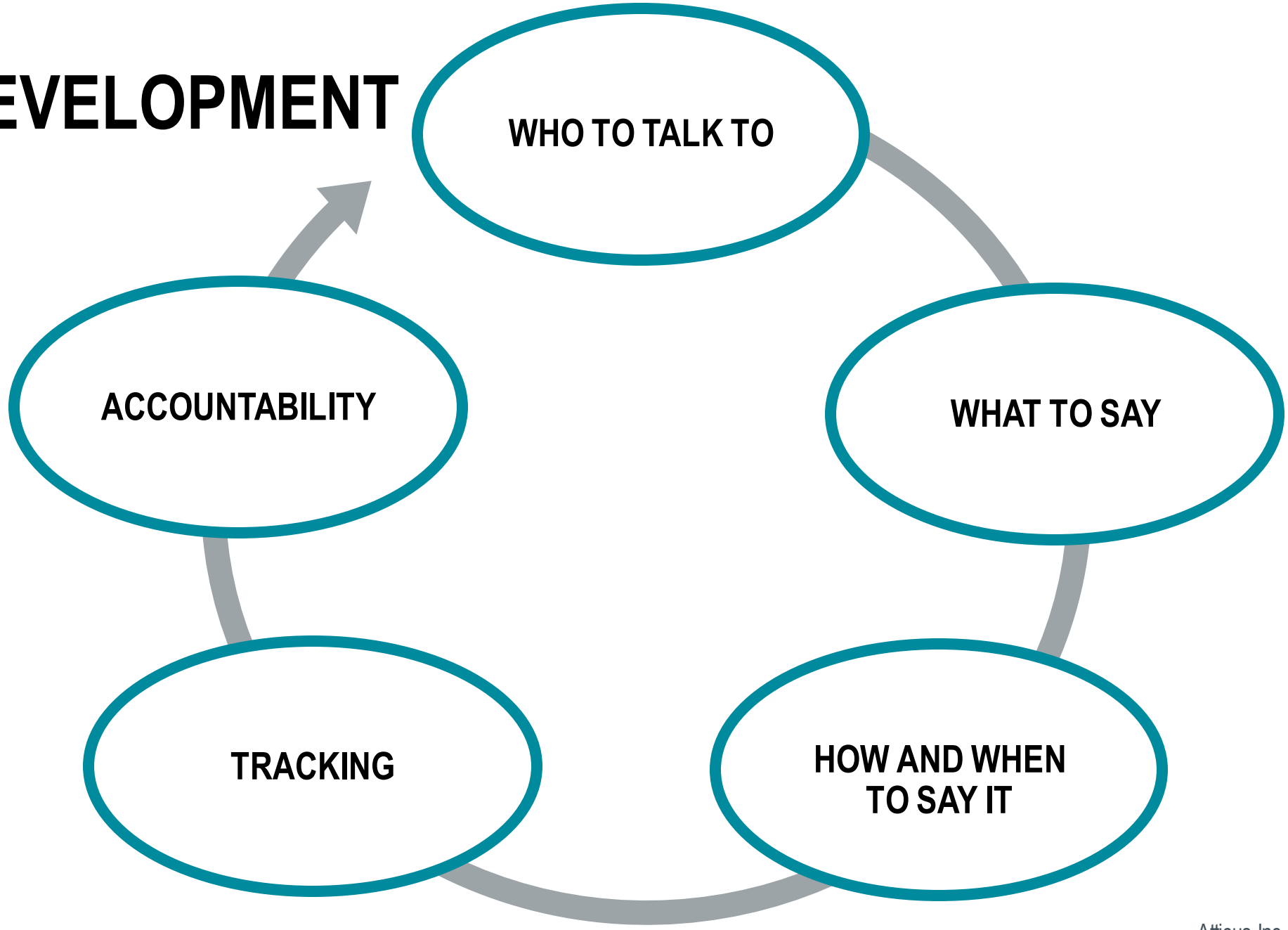

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WHO TO TALK TO

- Depends on your practice area
- Some easy thoughts
  - Existing and past clients
  - Attorneys
    - Non-competing, some competing (cases they don't like) and lawyers you refer work to
  - Professionals
    - CPAs, Financial Advisors, Therapists, Doctors, Social Workers
  - Look at who is sending you work now

STRATEGY 4: WHAT TO SAY

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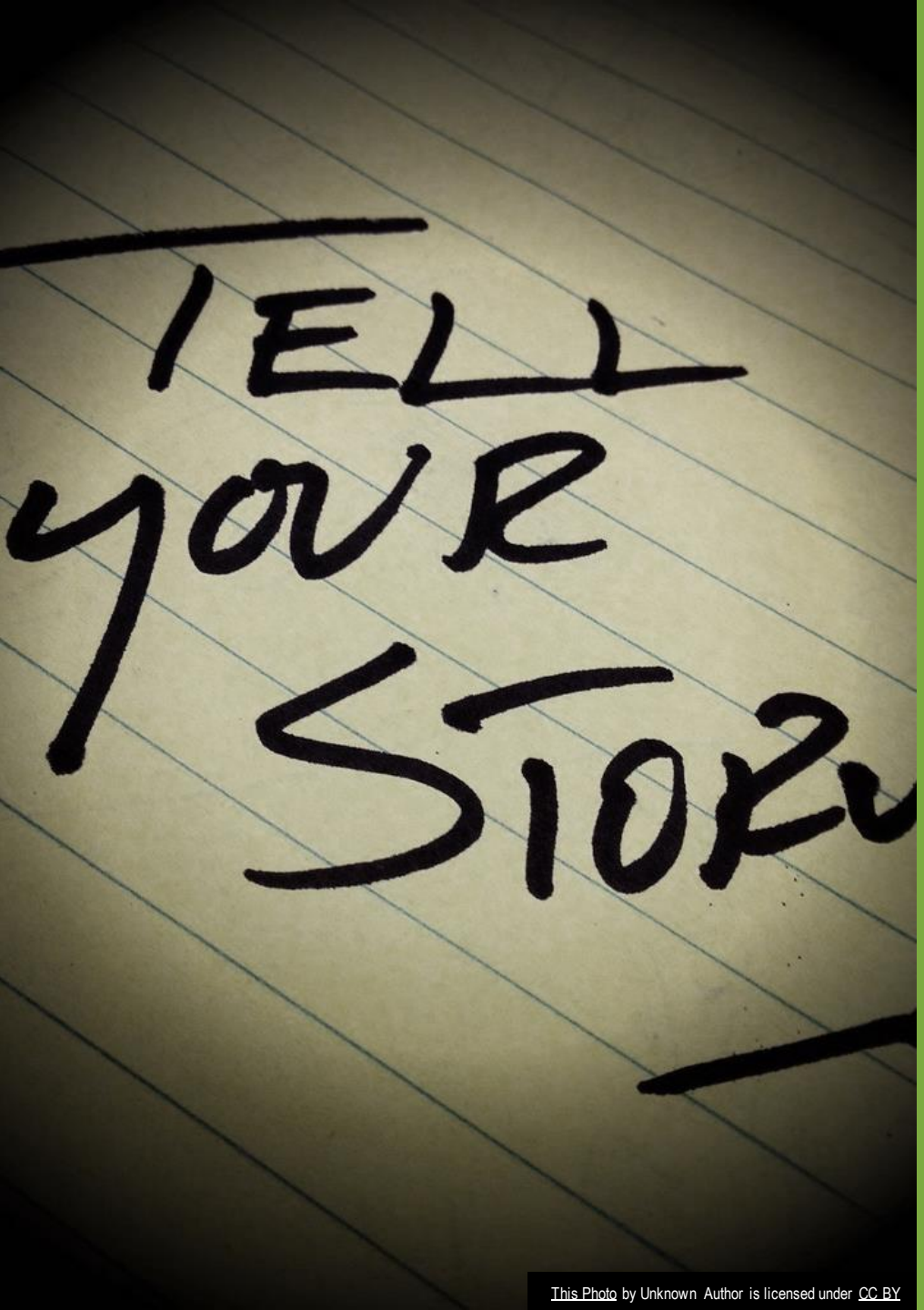
4 KEY STRATEGIC CONVERSATIONS

1. My Practice Focus Statement
2. The Strategic Interview™
3. Storyselling™
4. Acknowledgment and Requests



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HOW TO CREATE YOUR PRACTICE FOCUS STATEMENT™

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PRACTICE FOCUS STATEMENT™

- I am an attorney
- I help…….
- Who are (stressed, worried, dealing with, wanting)…….

PRACTICE FOCUS STATEMENT™

- I am an attorney
- I help good people who were in the wrong place at the wrong time
- Who are stressed because they are wrongfully accused of a crime

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STRATEGY 5: DEVELOPING AND PRACTICING YOUR ASK

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THE *SCARY* REQUEST: ASKING FOR BUSINESS

- How to turn the toughest lawyers into quivering mounds of goo
- Give yourself a scale 1 to 10
  - 1: new, cold relationship
  - 10: close friend who you have worked with before

Seven examples of asking for business

REQUESTS WITH WARM CONTACTS

(Score 1 to 10; if Above 5)

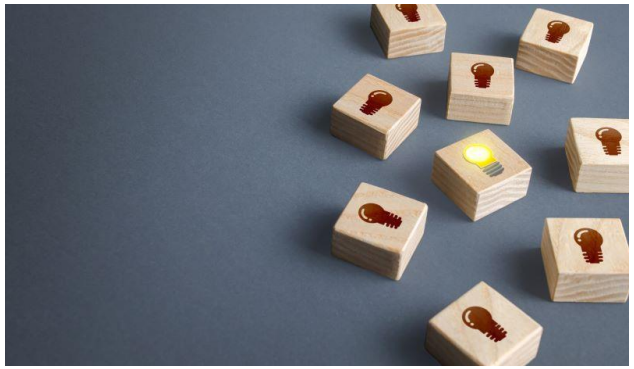
1. **Guilt**: It has been a long time since you have referred new cases to me, what is going on, did I do something to offend you?
2. **Bored**: I am bored out of my mind; do you have any great cases we can work on together?
3. **Fun**: I have a lot of fun working cases with you, anything we can do together?
4. **Frank**: Business is slow, do you have any cases you can send my way?

REQUESTS WITH COLD CONTACTS

(Score 1 to 10; if Below 5)
YOU MUST BE CAREFUL

5. **Test case**: I think there might be a good fit between us, do you have test case you would like us to try together?
6. **Ugly**: Is there a tough case you have been putting off working on that we can explore working on together?
7. **Direct**: Out of curiosity, is there anything in the way of you sending us a case to test us on?

UPCOMING WORKSHOP AND STAYING CONNECTED



"THE BENEFITS OF A GOOD HIRING SYSTEM – HOW TO USE THE DISC ASSESSMENT TO ATTRACT GREAT TALENT"

March 22nd, 2023, 2:00-3:30pm ET

- Register at: https://atticusadvantage.com/what-we-do/workshops/
- At check-out enter "**HIRING50**" to get ½ off registration for the workshop

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UPCOMING WORKSHOP AND STAYING CONNECTED

"THE BILLABLE HOUR LAW FIRM WORKSHOP – IMPLEMENTING GROWTH STRATEGIES TO MAXIMIZE PROFITS"

April 27th, 2023, 2:00-3:30pm ET

- Register at: https://atticusadvantage.com/what-we-do/workshops/
- At check-out enter "**BILLABLE50**" to get ½ off registration for the workshop

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Final Thoughts & Questions

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