

The Referable Lawyer Scorecard: Basics™



Name: _____ Date: _____

	Reactive	Frustrated	Maintaining
Criteria	1	2	3
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.
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.
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)
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
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.
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.
Follow up and tracking	I don't have time to follow up and track. I am way too 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.
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.

Proactive	Strategic	Prior	Now	+/-
4	5			
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 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.			
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.			
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.			
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.			
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.			
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.			
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

Top 3 Insights		

Top 3 Actions		