

# REFERRAL MARKETING – HOW TO CULTIVATE NEW BUSINESS



# MARC WHITEHEAD

## ATTORNEY & ADJUNCT PRACTICE ADVISOR

- The Founder of Marc Whitehead & Associates, Attorneys at Law, LLP, in Houston, Texas
- Successfully litigated disability claims in 44 states and counting plus Puerto Rico
- As an Adjunct Practice Advisor for Atticus, advises and coaches other lawyers on running successful practices
- Double board-certified in both personal injury trial law and Social Security disability law
- Authored multiple books on the topic of disability benefit claims and litigation





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*Great Practice. Great Life.*

# ABOUT US

We help lawyers grow great practices  
and cultivate great lives



# INTENTION

- The time you want to invest in this process
- Your ask: Who to talk to and what to say
- Your follow-up and tracking process
- Get you more referrals and more great clients!

# HELP US GROW: CONNECT AND SHARE

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# UPCOMING WORKSHOPS AND PROGRAMS



## THE PRACTICE GROWTH PROGRAM™

San Francisco

Orlando



## DOUBLE YOUR REVENUE WORKSHOP™

June 23<sup>rd</sup>, Orlando  
September 8th, San Francisco  
November 3<sup>rd</sup>, Orlando



## STRATEGIC REFERRALS— MARKETING FOR LAWYERS

June 20<sup>th</sup>, 2-3:30 pm ET

# MORE THAN JUST BEING GREAT AT THE LAW



# OTHER CLIENTS VS. REFERRED CLIENTS

Other Clients	Referred Clients
Price sensitive	Value per case is higher
View legal services as a commodity	Lower acquisition cost
Require more time and effort to convert	Prospect is pre-sold
Lower case value	You get the three rebuttable presumptions
Little or no loyalty	Insulates you from big advertisers in the market



# WHY LAWYERS DON'T STRATEGICALLY AND CONSISTENTLY BUILD REFERRAL RELATIONSHIPS

Time

Skills

Anxiety

Unsure

Sales-y

Judgement

Strategy	Score (1 low-10 high)	Why	Next Action
Open to Learning			
Authentic and True to Self			
Time Invested			
Know Your Process			
Know and Practice Your Ask			
Know Right Fit Client			
Know Right Fit Referral Source			
Look and Act the Part			
Manners			
Follow Up and Tracking			
Top 3 Insights			

# ASK AND YOU SHALL RECEIVE

Never assume your clients, friends, or potential referral sources know you want referrals. It's important to let your contacts know that your practice thrives on referrals!

There is a direct correlation between the number of times you ask for referrals—and the directness with which you make the request—to the number of referrals you receive.

# TIME INVESTMENT

- Develop scripts and variations
- Identification of Top 20
- Rule of 3
- Implementation of referral processes and communications
- Tracking and follow-up
- Building and nurturing
  - Impactful and personalized connections
  - Gifting and appreciation
  - Honing and strengthening

# WHO ARE YOUR REFERRAL SOURCES?

## Clients

- A satisfied client is a walking advertisement

## Current Referral Sources

- Keep rapport and contact consistent and nurture these individual

## Potential Referral Sources

- Other attorneys
- Related professionals
- Agencies, facilities, groups, individuals, boards, etc.

## Friends, Family & Acquaintances

- Don't assume they know what you do or that they will remember



## HOW TO ASK FOR REFERRALS WITHOUT SOUNDING “SALES-Y”

- Get over it
- Develop scripts
- Practice
- Do it

# KNOW YOUR IDEAL CLIENT PROFILE

- Who do you want to work with?
- Who is your ideal client/your “A Client?”
- Who do you best serve?
- What are they currently doing?
- What are their pain indicators?
- What are their trigger events?





# PRACTICE FOCUS STATEMENT™

I am an attorney

I help.....

Who are (stressed, worried, dealing  
with, wanting).....



# THE POWER OF REQUESTS

**Acknowledgment:** It has been an honor to represent you. I am very selective about the people I/we represent. What I liked about representing you was ...

**Why:** Why do you like, respect, or appreciate that trait? Express feelings about what makes them a great client.

**Honored:** If you know someone like you, with a similar problem, I would be honored to help them.

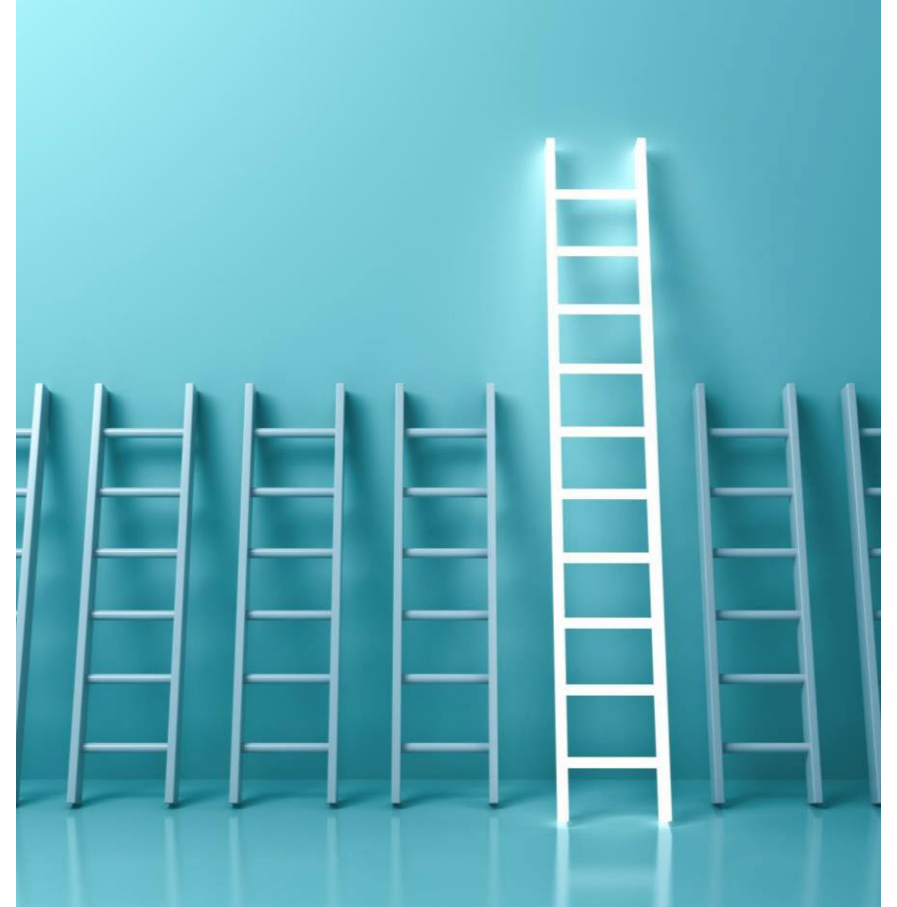
**Tell your friend/colleague to call/email and use your name:** This is an implied white glove experience for their referral.



# Follow-Up & Tracking

# MEASURE AND SET GOALS

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



# TRACKING ALLOWS THANK YOU

- Prospect referred but the case turned away:
  - Acknowledge it
  - Thank them for the referral
  - Let them know what happened
  - Let them know why
  - And ask them to keep the referrals coming
  - Thank you for thinking of us
- Prospect becomes as case:
  - Thank them
  - If it is a great case, call them and thank them
  - If there is a referral fee, document and respect the process ethically
  - If there is no referral fee, send a thank-you gift that you think is appropriate
  - Ask their assistant for favorites and insights

# STRATEGIC REFERRALS – MARKETING FOR LAWYERS

**JUNE 20, 2023**

**2:00 – 3:30 PM ET**

Register today and get ½ off!

Link in the chat box

Use Promo Code: **50REFER**  
at check-out



# CONTACT MARK WHITEHEAD

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# Final Thoughts and Questions

Thank You



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