

# MASTERING REFERRALS: CREATING AN EVERGREEN REFERRAL SYSTEM

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## PRACTICE GROWTH DIAGNOSTIC ADVISOR & DIRECTOR OF MEMBER SERVICES

- Denise is a well-respected practice growth advisor, speaker, and blog writer. She has committed over ten years to helping attorneys grow their practices in a sustainable and intentional way using Atticus coaching processes
- She has worked with hundreds of solo and small firm attorneys, across the United States and Canada, to diagnose issues in their practice holding them back from growth and satisfaction
- Before her work in attorney practice management, Denise was a sports anchor and television personality. Her experience, wit, and front-stage personality engages with audiences. She is never a dry speaker





ATTICUS™  
*Great Practice. Great Life.*

# ABOUT US

We help lawyers grow great practices and cultivate great lives

# PARTICIPATE



Pencil & paper  
ready



Take lots  
of notes



Use the chat box to  
submit questions

# HELP US GROW: CONNECT AND SHARE

- Subscribe to Great Practice. Great Life by Atticus podcast  
<https://podcasts.apple.com/us/podcast/great-practice-great-life-by-atticus/id1636511715>
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# MORE THAN JUST BEING GREAT AT THE LAW





**This is a learnable business skill!**

# AGENDA



Proven strategies of how get started on immediately getting more great cases



Understanding The Referable Lawyer Mindset™ and where you stand



Work on what to say and when to say it



How to work on your **ask** so its ethical, comfortable, and effective



Five goals to kickstart the referral process



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

Time

Skills

Anxiety

Unsure

Sales-y

Judgement

# WHY CLIENTS?

# 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
- 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



# STRATEGY 1: UNDERSTANDING YOU ARE CREATING A SUSTAINABLE EVERGREEN PROCESS



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			

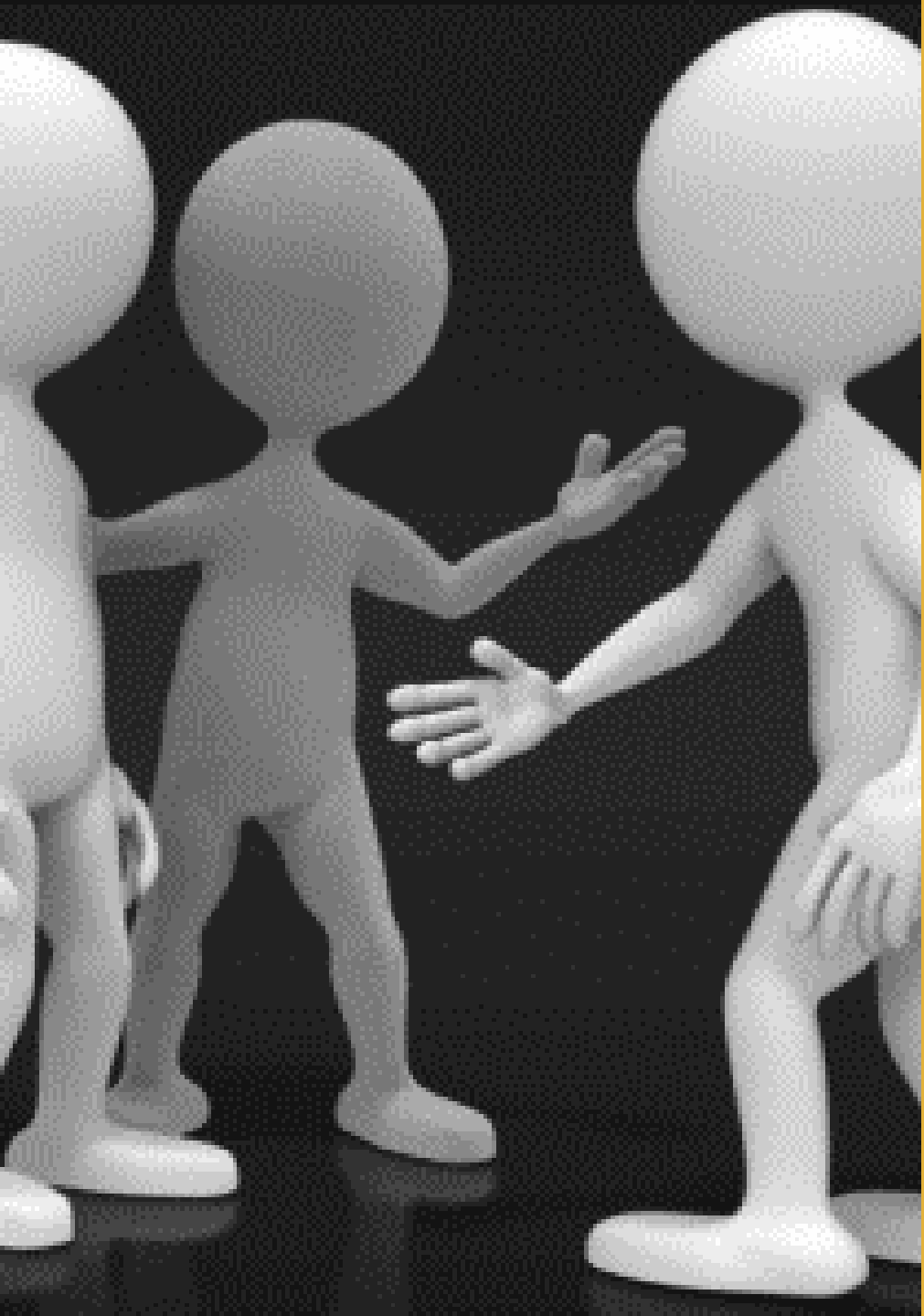


# STRATEGY 2: MEASURING, TRACKING AND BENCHMARKING SO WE CAN LEARN

# 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





# STRATEGY 3: WHO TO TALK TO

# CLIENTS!

- Probably the most overlooked source for great referrals
- Why
  - Big **assumptions**
    - Clients know exactly what you do
    - Clients are happy
    - Clients know what a great client/case looks like
    - Clients know that you want more business
    - Clients know how to refer business to you AND what your process is

# 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,
  - Look at who is sending you work now



# WHO TO TALK TO

- Appreciate the difference between past and current clients with active matters
  - May have different approaches for past and current clients
  - Strategy for requests, top of mind awareness, and engagement may be different depending on your practice area.
- Ask the clients you like
- Clients, if happy, will refer up and sideways
- Clients, if unhappy, will refer down
  - Refer because you are the only lawyer they know
  - Be careful, unhappy clients never refer happy clients

# THE KEYS TO BUILDING CREDIBILITY AND AUTHORITY

- Be useful
- Be humble
- Manners
  - Please, thank you, show up on time, and do what you say you're going to do
- Website matches what you say
- Look the part-dress professionally
- Customer service is key
- Never, ever complain
- Avoid gossip, politics
- Follow up on your promise

TELL  
YOUR  
STORY

# HOW TO CREATE YOUR PRACTICE FOCUS STATEMENT™

# WHAT TYPE OF CASES ARE CRITICAL

- If you don't tell them specifically what a great case looks like they will send you anything and everything
- They just need examples, and not a lot of specifics
  - I like blue sports cars versus I love blue Ferraris
    - Which is better than I like cars. Any kind of cars. Wheels, no wheels, engine-I am not picky



# 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





# STRATEGY 5: DEVELOPING AND PRACTICING YOUR ASK

# THE POWER OF REQUESTS

- I have a request
- I have a question
- Would it be okay
- Is there anything in the way of..

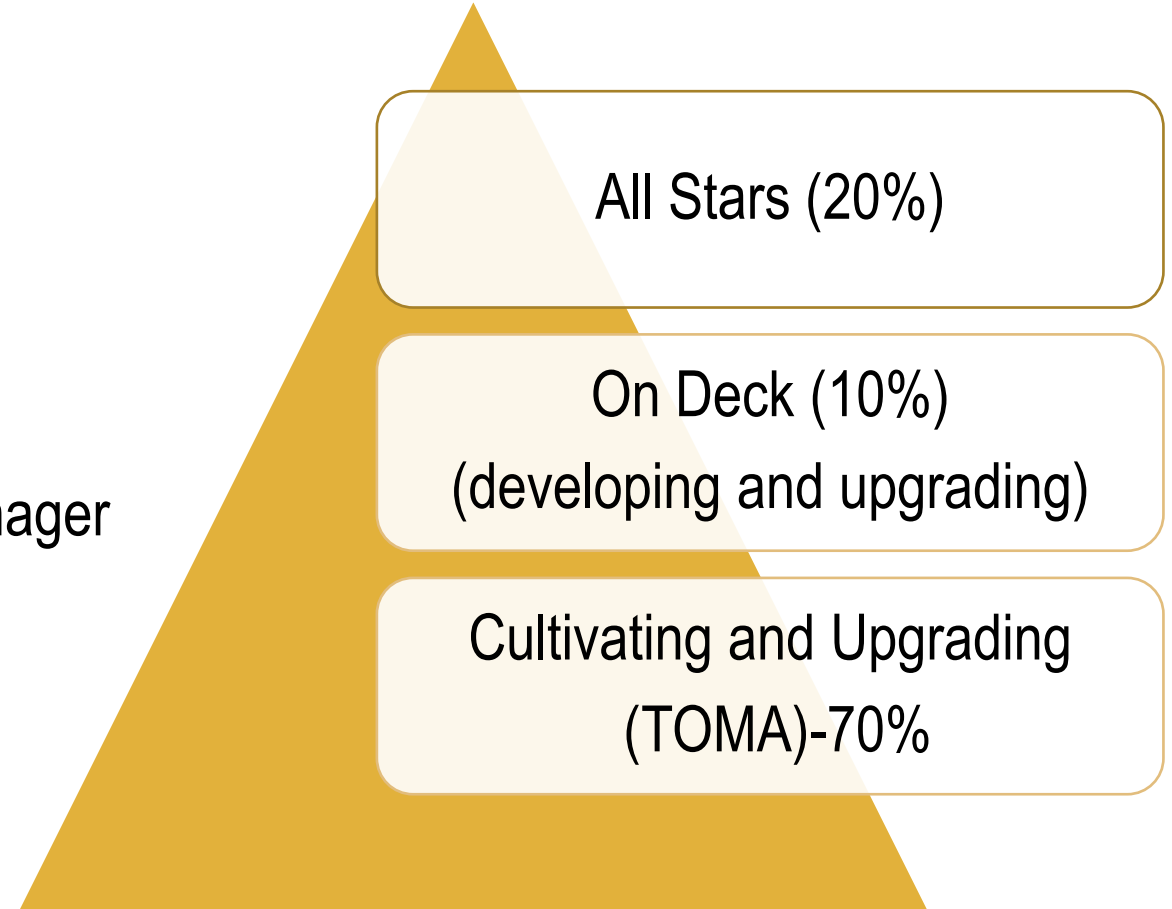
# Acknowledgment and thank you process

# TRACKING ALLOWS THANK YOU

- Prospect referred but case turned away
  - Acknowledge it
  - Thank them for the referral
  - Let them know what happened
  - Let them know why
  - And ask them to keep them 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 not, send a thank you gift that you think is appropriate
  - Ask their assistant for favorite vices do not assume your vice is their vice

# TOP OF MIND AWARENESS

- The All Stars (20%) and On Deck (10%)
  - Call them, one on one time
  - Send them a unique article
  - Help them-intros, support, books, etc.
- 70%
  - Marketing assistant or relationship manager
  - Social media
  - Email “alerts, case updates, wins”
  - Invite to events such as happier hours





# ARE YOU READY TO ELEVATE YOUR REFERRAL SOURCES?

- Check the chat box
- Schedule your free consultation
- Discuss your current marketing processes
- Create a better client experience
- Commit to 3 marketing contacts per week



# Upcoming workshops and programs



## GROW YOUR LAW PRACTICE WITH AI WORKSHOP

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Starts February 29, 2024  
Zoom



## THE PATH TO A GREAT PRACTICE AND GREAT LIFE WORKSHOP

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March 1, 2024  
Zoom



## SALES WITHOUT SELLING: THE ATTICUS SALES TRAINING ACADEMY

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May-November 2024  
Orlando, FL and Zoom

# Final Thoughts and Questions

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Thank You



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