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Play to Win

Cultivating Internal Referral Sources

Your colleagues assume that the way you treat them is how you'll treat their clients.

By Sally J. Schmidt

I had two interesting conversations during recent coaching meetings. The first involved a lawyer — let's say Partner 1 — who had an opportunity to expand a client relationship into a new practice area. His colleague, Partner 2, is particularly well-suited for the work. But Partner 1 had some reservations, asking me, "Do you know Partner 2 very well? She doesn't seem very friendly."

In another firm, Partner A, in an effort to expand work to another state, talked about introducing Partner B to the client. When I talked to Partner B the following week, I asked if he had heard from Partner A, which he had. I asked what had transpired and he responded, "I suppose I should call him back to talk about it."

It amazes me that lawyers fail to recognize the impact that internal relationships, branding and communications can have on building their practices. I know lawyers who send work *that can be done by a colleague* to lawyers in other firms because they feel more confident making that recommendation to their good client.

I can hear the arguments. Sure, some of your colleagues will not share credit or origination with you. But if it involves a firm client who requires additional services, you might get some interesting work and the firm as a whole will benefit (rising tides). Sure, you may be busy. But your response to each opportunity will determine whether you get calls in the future.

Getting Business From Colleagues

How you treat your colleagues is how they assume you'll treat their clients. If you are not responsive, if you lack empathy, if you demonstrate poor listening skills, other lawyers will be loath to introduce you to a client.

What can you do to be the first call for new projects?

- **Be responsive.** When a colleague contacts you with a question, respond ASAP. If you can't do it, delegate it to a member of your team.
- **Assess the situation.** Ask a lot of questions. Is it a big deal or small issue for the client? What information is needed? How quickly does this require a response?
- **Be honest.** Is the work in your wheelhouse? Are you confident you can handle the issue well? Can you stay within the client's budget?
- **Follow up quickly.** Send your colleague whatever is needed to capitalize on the opportunity as soon as you can, whether it's an outline of the process, a section for a proposal or a fee estimate.

- **Be available.** If your colleague needs your help closing the deal, offer to participate in conference calls, pitch meetings or visits.
- **Identify your colleague's expectations.** If you're lucky enough to land the new business, find out what approach you should take with the client. What role does the primary contact want to play? How does your colleague want to be kept in the loop? Should you contact the client directly or work through the relationship attorney?
- **Continue to seek follow-up opportunities.** When you find information that would be helpful to the client, such as an article, advise your colleague. Offer to conduct a client-specific training session or CLE program. Keep the primary lawyer apprised of other similar matters you are handling or related market information.

Minding Internal Relationships

For some lawyers, firm partners are their primary (or only) sources of work. For most others, colleagues can be great referral sources. To increase the odds you'll get the call, cultivate your internal relationships. Then, when you are contacted:

- Be accessible.
- Be responsive.
- Be helpful.
- Be courteous.