

Play to Win

Struggling to Reach Potential Clients? Find the Middleman

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To reach your target potential clients, focus on building relationships with referral sources who are “gatekeepers.”

Recently, I was talking with a gentleman about his shoulder replacement surgery. He said he knows an anesthesiologist who had recommended the surgeon. The anesthesiologist told him, “I’m in the operating room and see all the surgeons at work. This one is the best.”

It echoed one of the principles I try to reinforce with lawyers:

“Know the people who know the right people.”

So often, lawyers struggle to find targets for business. Challenges can include:

- Everyone is a potential target (e.g., estate planning or general corporate work).
- You can’t predict the need (e.g., divorce or litigation).
- It’s hard to find them (e.g., closely held businesses or startup businesses).

Reach Potential Clients by Focusing on Gatekeepers

In contrast, one person often can be a gatekeeper of sorts for a number of prospective targets, such as:

- Wealth management professionals for estate planners
- Accountants for business lawyers
- HR consultants for employment lawyers
- Valuation advisors for family lawyers
- Insurance brokers for employee benefits attorneys
- City planners for land-use lawyers

Every practice has its potential sources of referrals, from banks to other lawyers to association executives.

Building the Relationship

The relationship with a conduit needs to be a two-way street. In most cases, your contact would like more business, too, so you may need to discuss opportunities for referrals. In those instances where it is harder for you to reciprocate, you need to think about ways you can add value, either to the personal relationship or to a person’s relationship with their own clients and customers.

Here are some ideas for [building relationships with potential referral sources](#):

1. **Introductions:** Set up a meeting to discuss your respective client lists and plan introductions.
2. **Value adds:** Offer to provide alerts, training programs, hotlines or other benefits for their clients.
3. **Legal advice:** Provide second opinions or quick reviews of documents at no charge.
4. **Promotion:** Invite them to sit on panels or give presentations to your clients or colleagues.
5. **Personal assistance:** Recommend them for boards, committees, awards or private clubs.
6. **Collaboration:** Work on a project together (e.g., an article or podcast).

Obviously, when making referrals, most important is that clients receive great service and advice; [decisions to refer business should not be based on a quid pro quo](#). But there are a lot of good professionals out there and building closer relationships with a few people you get to know and trust can be a good strategy for both business development and client service.