

Module 4: Part b

Planning for Success: Building referral sources and clients for life



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THE NPI MODULES

INTRODUCTIONS & BUILDING
A STRONG FOUNDATION

PRACTICE MANAGEMENT &
PROCESS IMPROVEMENT

LEADERSHIP

PLANNING FOR SUCCESS



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Build a Platform. Not a Pipeline.*

- **Pipeline businesses** - create value by controlling a linear set of activities - inputs go in one end, get transformed and come out as something different.
- **Platform businesses** - “bring together producers and clients in high-value exchanges”. “Their chief assets are information and interactions, which together are also the source of the value they create and their competitive advantage.”



Prodonovich
THE KEY TO SUCCESSFUL PRACTICE: STOP FOCUSING ON WINNING WORK

By Sue-Ella Prodonovich
The most common question professionals ask me is, “how do I win more work”? The answer I usually give them - and one which doesn't always go down well - is to stop thinking about winning.

To this end, I was intrigued by [this Harvard Business Review article](#) that suggested the key to creating a resilient business was to build a platform rather than a pipeline.

Pipeline businesses, the authors explained, create value by controlling a linear set of activities - inputs go in one end, get transformed and come out as something different. Platform businesses, on the other hand, “bring together producers and clients in high-value exchanges”. “Their chief assets are information and interactions, which together are also the source of the value they create and their competitive advantage,” the article said.

To illustrate this point, the authors noted that when Apple launched its iPhone in 2007, five manufacturers - Motorola, Nokia, Samsung, Sony Ericsson and LG - accounted for 90% of the industry's total profits. By 2015, Apple single-handedly generated 92% of global mobile phone-related revenue. That same year, four of the five previous incumbents made no profit

*Prodonovich Advisory

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Focus on Referrals

When selecting firms, in-house counsel rely primarily on personal referrals from the following sources (*top 2 choices selected*):

- Recommendations from current outside counsel **(79%)** internal and external
- Company approved list (50.4%)
- Ask in-house counsel at their company (49.6%)
- Ask in-house counsel at other companies (48.9%)



ACC Study

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Five Steps to a Referral



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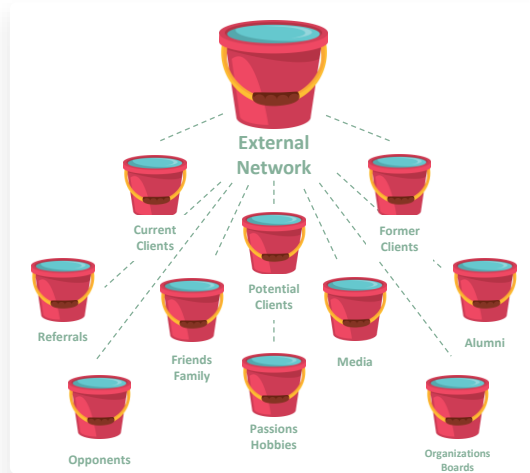
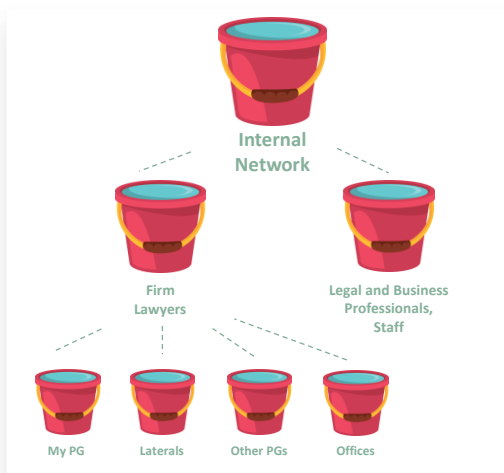
SCG Legal Referrals

- Types
 - With a member
 - Via a member
 - Via a member's contact
- Referrals are created through trusted relationships – this takes time and effort
- Can you get a referral for someone from your existing clients?



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Grow and Nurture Your Networks



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Create SMART goals



Specific: Precise statement of what needs to be accomplished: exactly what are you going do, how much? When? How often?



Measurable: Concrete criteria for gauging progress. Helps you manage and evaluate your goal.



Attainable: Assurance your goal fits your ability. Something you can accomplish. Not too easy or too hard



Relevant: Personalization of your goal. Supports your interests, values, needs and talents. Critical to motivation.



Timed: Beginning point and deadlines. Gets your started and keeps you on track.



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Building Blocks

- Get your information on referrals organized
- Encourage and reward referrals as appropriate
- What roles do members of your team play in the referral process?
- Determine what percentage of your annual work originates from referrals (inside and out)
- Take (at least) that same percentage from your marketing and business development budget and efforts and reinvest it in the referral process and relationships



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Provide an excellent experience



Be reliable



Respond to inquiries immediately



Be on time



Help other members



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Make it easy to refer clients to you

- Focus on the Intake process
- Create “frictionless interactions”
- Share positive testimonials
- Share when others are referring clients to you



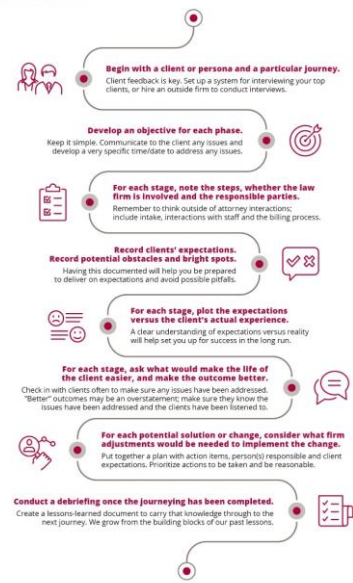
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Creating a Client Journey Map

Impressions and Moments of Truth

Any interaction during which a person may form an impression of you, your firm, your brand or product.

This impression may be either positive or negative.



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Build relationships with other professionals

- A lead is not a referral
- Make sure your network understands how to generate the referral
 - Share card/contact info
 - Phone call
 - Email
 - Face to face



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Ask for - and give - referrals



- Be clear about what kind of work/clients you want
- Make sure the business is worth it
- Consider revising your elevator speech for referrers
- Show what's in it for them
- Find and nurture your best advocates



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Connect – and Follow Up

- Say thank you. Show appreciation!
- Create Outlook contacts
- Ensure all lawyer referral sources are added to the firm’s mailing list
- Connect on social media
 - Send personalized “let’s connect” messages on LinkedIn
 - Follow them on Twitter
- Be proactive – keep in touch



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Keep your referral sources vibrant*

- Act immediately
- Honor the contract
- Keep sources informed
- Say thank you



*Mike O’Horo, Attorney at Work

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Thank you!



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