

CounseltoCounsel Blog

[Want More Referrals? Give More Referrals-And Be Proactive](#) by [Stephen Seckler](#), Seckler Legal Coaching

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I was at a holiday party in December and ran into a few parents from my neighborhood. One was a financial planner and I began speaking with him about a subject near and dear to my heart: business referrals. I asked him if lawyers were a big source of business for him (trusts and estates lawyers in particular) and he immediately responded by saying “lawyers are the worst”. In other words, for this financial planner, it is not worth spending a lot of time with attorneys because they are unlikely to reciprocate with referrals.

Being in the business of coaching lawyers on how to generate more work, I felt determined to disprove him. Certainly there are many attorneys out there who understand that giving a referral is the best way to get a referral. It’s human nature. When someone helps you, you want to reciprocate; and for most professionals, getting leads for more work is a big help and will certainly make you want to remember the person who made the referral.

Sure enough, I got my chance a few minutes later when a T&E lawyer I know walked by. I immediately pulled him over and made the introduction (Jim meet Dave. Dave meet Jim. The two of you should get to know each other because you provide different services to the same clients.)

Dave, the estate planner, then surprised me. He said that he doesn’t have much opportunity to refer work to financial planners. When I asked why (it seems like an obvious cross referral relationship to me), Dave simply said that his T&E clients never ask for a referral to a financial planner.

Jim, the financial planner, smiled immediately. Dave had just made his point. I, on the other hand, suddenly realized that I have some additional educating to do. Unless Dave has some aversion to financial planning, it seems to me that maybe Dave is not being proactive enough.

In speaking with your clients and business contacts, you can choose to focus only on the legal issues that they present to you. But if you want to make more referrals, spend time [asking more open ended questions](#) (about their interests, their families, their businesses, etc.) If you become a *good listener*, you will learn about opportunities to sell your own services or services that other lawyers in your firm may be able to provide. But if you become a *great listener*, you may even identify needs that other professionals may be able to satisfy. And the more you do this, the more referrals you will be able to make.

This is not only the right thing to do (and feels good as well), but it will certainly help your own practice to grow. So start asking questions.