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# INDIVIDUAL ATTORNEY REFERRAL WORKSHEET

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WHAT YOUR PARTNERS NEED TO KNOW TO SELL YOUR SERVICES



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# INDIVIDUAL ATTORNEY PRACTICE REFERRAL SCRIPT AND SNAP SHOT

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## Directions:

This exercise should be performed among a group of attorneys to better familiarize them with the practices and capabilities of their fellow attorneys. Have each attorney complete the Attorney Snap Shot. Pair attorneys up based upon practice synergies<sup>1</sup>. Perform the exercise in a practice groups, across practice groups or as a firm wide exercise. The exercise should be performed multiple times by each attorney to enable familiarization with several attorneys. Keep the worksheets for future reference.

Answer every question in the script. Be brief and concise. List only the most impressive or substantial pieces of information. This is not a bio or CV. This is information which will be used to create a compelling referral or pitch script.

After each section is completed, go back through and prioritize each entry in each section by which entries are the most impressive. Stay objective. Keep in mind what would be impressive to the client, not other attorneys. Once you have prioritized each entry within its respective section, go through the entire document and prioritize each section to come up with the two or three items that are the most impressive in the snap shot.

Next, write your referral script. Keep it concise using only two or three of the most impressive achievements. Don't worry about qualifying any achievements or explaining the circumstances. Review the example given below. Explanations will come later. The purpose of the referral script is to get agreement from your client to meet your partner.

## FOLLOW THIS FORMAT IN YOUR SCRIPT:

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- Introduce the attorney
- Cite the most recent and most impressive case or matter. Name the clients if possible and if they enhance credibility.
- State how this case was note-worthy or created value for the client.
- Cite an example of a value added service the attorney has done for clients.
- Cite the attorney's most impressive influence, position or thought leadership
- Conclude with a choice of three dates and times that the client can choose from for a meeting.

## EXAMPLE:

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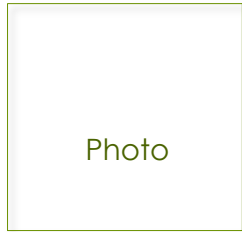
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"[Attorney name] is an IP lawyer who recently won a \$2.6 million verdict against [company name] for infringement on a chemical component of their bug spray. Two other firms failed to come up with a winning strategy on that same issue. She also recently re-organized [company name]'s international trademark monitoring portfolio saving them 35% and speeding the renewal process by six days while ensuring no lapse in filings for the company. She is a former Patent Office Regulator and chairs the ABA's IP section. I think she'll have some great ideas for your company. At least, she'd be a good resource to know. I'd like to introduce her to you. "



## ATTORNEY SNAP SHOT

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Attorney name:

Practice group:

Office:

Direct phone #:

E-Mail address:

Cell Phone #:

**PERSONAL STATEMENT:** *Often called an “elevator speech”, this description captures in one to two sentences the essence of your practice and how you assist clients. This should be done last. Think of it as the executive summary of the snap shot.*

**PRACTICE AREAS:** *List any general and/or niche practice areas or legal specialties. The fewer and more specific, the better.*

**KEY CLIENTS / INDUSTRIES:** *List your top 2-3 clients and any industries in which you have significant experience.*

### ONLINE PRESENCE:

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1. *Firm, personal website and/or blog addresses: list the addresses of any personal websites, blogs or other micro sites you maintain. Describe the purpose of each.*



2. **SOCIAL NETWORK SITE ADDRESS:** Enter your Face book, LinkedIn, Twitter, or other social networking site address.
3. **PARTICIPATING SITES:** Name the groups in which you actively participate including Legal On Ramp; JD Supra; Martindale Connect; Linked In Groups; etc.

**PERSONAL SERVICE COMMITMENT:** Describe your personal commitment to client service in one to two sentences. This could include the level of accessibility (even after normal business hours), a commitment to responsiveness within a specified time frame, returned calls/e-mails, a commitment to staying within budget or other service related commitments.

**DESIRED CLIENT PROFILE:** Profile your ideal client by listing the company size, company lifecycle, industry, regulatory issues, other issues faced, etc.

**KEY CLIENT RESULTS / CASE STUDIES:** Give brief examples of the results that you have achieved for clients including those resulting from service delivery, legal strategies, operational efficiency and other results. Where possible, assign a monetary value to the results.

**THOUGHT LEADERSHIP:** List the publications and articles written in the past year, speaking engagements and other evidence of thought leadership.



**UNIQUE ACCESS, INFLUENCE OR CLOUT:** *List relationships, organizations, associations or clubs which grant you unique and exclusive access to individuals who can influence or assist in certain types of matters.*

**PHRASES TO LISTEN FOR:** *List the words and phrases that attorneys should listen for in their conversation with clients which may indicate client needs in your practice area.*

**UNIQUE VALUE-ADDED SERVICES OFFERED:** *List services, publications, processes, research or activities which are unique, provide additional value and build client loyalties.*

#### ABOUT THE AUTHOR:

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Group Dewey Consulting provides complex consulting services to midsize law firms and practice groups. Our strengths include: strategic assessments and planning; client development programs and coaching; client satisfaction research and client service programs; and marketing, branding and communications. Group Dewey can be reached at 503.693.4731

Eric Dewey is an expert in driving growth and efficiency in professional service firms through innovative and practical marketing and client development strategies. With over 25 years of marketing and business development experience in five service industries, Dewey has counseled hundreds of attorneys in prospecting, client development, marketing effectiveness and presentation skills. He brings executive level leadership, sound business judgment, innovative strategies and a breadth of practical knowledge to his engagements. He has three daughters, is a semi-professional percussionist and plays league Ultimate.



A prolific writer, Dewey authors the Legal Marketing Blog, [Lawyer Up! Strategies](#) and has been named the 153<sup>rd</sup> among the 500 top CMOs from more than 15,000 in the country. Eric holds an MBA from Ohio University. Dewey has held the senior-most marketing professional positions in two AmLaw 200 law firms, the largest securities class action firm in the U.S., a regional bank holding company and several commercial real estate developers. He has consulted small and midsize law firms and businesses since 1996.

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<sup>i</sup> Practice synergies are practices which are commonly used by a client type or practices in which there are regular inbound and outbound referral relationships.



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