

PLAYING THE NETWORKING GAME

A View from the Coach's Chair

By Shawn McNalis

“But how does it work?” the attorney asked us, pressing for an answer. “How do you just go out, meet someone and then turn that person into a referral source?”

The question was posed to us at an Atticus marketing workshop. Mark Powers and I were leading a lively group of attorneys, made up of mostly sole practitioners and a few mid-size and large-firm attorneys. The urgency in the attorney's voice was not unusual. This was a question we are asked frequently. How *do* you turn a business acquaintance into someone who can't wait to send you business?

The attorney was mystified. “What are the nuts and bolts to this process? You ‘marketing people’ never talk specifically about what we should actually do and say.”

“Is there some kind of formula?” he persisted. “And how do you do this ethically, without looking like you need the business?”

The attorney sat down, satisfied that he had nailed us with an unanswerable question. The other members of the group trained their eyes on us. They looked amused by this exchange and waited to see what we had to say. Fortunately, the seemingly unanswerable question has an answer.

Is There a Formula to Marketing?

While not a hard and fast formula, there is an ethical process for attorneys to build the kind of relationships with new acquaintances that can result in referrals. We knew from experience that most of the attorneys in attendance already had these skills and just didn't realize it.

“Each of you has probably already done this many times,” Mark responded. “If you think about it, you probably have referral sources who send you business right now.”

Everyone nodded in agreement. Most of them wouldn't have gotten to where they were now without people in their current network who liked them, trusted their judgement and sent them business.

Mark continued, “You were not born knowing those people. At one time or

another you cultivated enough of a relationship with them that they sent you business. You just weren't aware that you were cultivating them. You simply did what seemed natural at the time. You made friends with them."

We could tell they wanted more of a magic bullet. Just make friends with them? The answer couldn't be that simple. But in the years we have spent coaching some of the top rainmakers in the legal profession, the winning formula that has emerged is simply this: *build friendships with people who are in a position to send you business.*

Mark continued, "Imagine how far you could get if you thought strategically about meeting and cultivating other professionals who could send you business. Many of you have gotten by through dumb luck or being in the right place at the right time. But the law is a business built on relationships. Forget about the Yellow Pages. When most lawyers analyze where their business comes from, referrals from clients and related business professionals usually rank as the top two sources. And these two sources yield the highest quality, most loyal and least cost-sensitive clients as well. There is something of a formula for building those relationships, but it is going to look a lot like the type of thing that you do when making friends."

There was a noticeable air of interest in the room. Pencils were poised to take notes.

Mark stepped over to the board and wrote in big letters:

HOW TO CONVERT AN ACQUAINTANCE TO A REFERRAL SOURCE

**ACQUAINTANCE
FRIEND
REFERRAL SOURCE**

The Acquaintance Stage:

"Let's start at the beginning of this process, which is usually preceded by an introduction of some sort. You meet a new person during the course of business, or perhaps you are introduced to him at a cocktail party. As you talk with him you realize that this person is someone who could potentially send you business. Let's say, for example, that you are an estate planning attorney and you've just discovered that the person with whom you are speaking is a CPA."

Mark went on to explain that being proactively “out there” -- attending specific functions that put you in a position to meet more new people -- is an important part of this formula.

“In order to be introduced to new people you must be exposed to them. If you aren’t out there now, make a decision to be out amongst potential referral sources at least once a week. You must go where they go and attend the functions that they attend. Most new referral sources will not come knocking at your door, though some will come to you during the normal course of business. Train yourself to recognize and capitalize on your everyday opportunities.”

Then Mark offered an alternative. “A second and more targeted approach to adding more acquaintances to your network is to educate your current referral sources about the types of clients with whom you most want to work. Then ask your sources to introduce you to other potential referral sources. In other words, if you think that one of your referral sources knows a lot of people who could also potentially send you business, ask this person to introduce you.”

At the sound of this, one attorney popped out of his seat. In an alarmed voice, he said, “I don’t want to go to those people and act like I am desperate for business.”

There is not one seminar that we have conducted that an attorney doesn’t voice this concern. It is a strong undercurrent in a profession that is understandably sensitive about its image. Many heads nodded in agreement. For quite a few of the attorneys in the group, it was unthinkable to have this kind of networking conversation. What would people say about them? How would it look?

What they didn’t realize, however, is that their counterparts in business operate very comfortably in this arena. Most businessmen and women are quite used to networking with people. Introductions are not seen as something of which to be ashamed, or an indication that the requester is in a desperate state.

“I understand your concern,” said Mark. “Let me give you some ideas on how to approach this situation so it is not so uncomfortable. The language you use can make all the difference. When you talk to your referral source, here is what you say.”

Mark then stepped into the role of the requesting attorney and said, ‘I am in a position right now to network and expand my business. I really enjoy working with you

and I want to network with more people of your caliber.’ He paused to offer alternatives, ‘Or, more people with your high standards, more people who are as professional as you are, more people who take care of their clients like you do.’ Then he continued, ‘Are there people you know who you think I should meet?’

“Now, if your referral source says yes, make it easy on him and suggest that the three of you meet for lunch. Or ask permission to call this third person and introduce yourself. Notice that this is not a solicitation for new business. Rather, it is a networking approach to meeting new referral sources -- people who are in a position to refer you new clients.”

A woman raised her hand and said, “I might feel comfortable having this conversation with some of my referral sources, but not ALL of them.”

“Great! Start with the ones with whom you have a good relationship. I suspect you will be pleasantly surprised, once you express a desire to expand your network, by how willing people are to introduce you to others.”

Mark then brought the group back to his earlier networking example. “But, getting back to our original subject. There you are, drink in hand at a party, and you realize the person in front of you is someone with whom you would really like to network. What do you do?”

The same woman raised her hand. We could tell that this process intrigued her. “You could tell them about what you do,” she volunteered.

“Very good. You could and should do that. But during this particular conversation try to listen more than you speak. Listen 70 percent, talk 30 percent. Try to learn about new acquaintances, engage them in conversation about themselves, their business, the kinds of people they like to work with and why. When you do speak, pick up on what they have said and expand upon it. Research has shown that it takes about 12 minutes of friendly conversation to begin to form a bond with a new person. Become Barbara Walters and interview them, listening for what you may have in common -- it might be sports, similar community interests or mutual acquaintances. There are any number of things you might have in common.”

Mark then asked, “Can anyone tell me why you are listening for things you may have in common with the new person you’ve just met?”

When no one answered, he responded, “It is because what you have in common will be the platform upon which the relationship is built.” Mark stepped back over to the board. “By generating a genuine interest in this person and finding a reason to further communicate with them, you will grow the relationship from the acquaintance stage to the friendship stage.”

Mark drew an arrow from *Acquaintance* to *Friend*, then paused to make his point. “This, by the way, is how you built most of the relationships you now have -- whether they were in kindergarten or law school. Of course, back then, you may have had a little more time to make friends. For most of you, time is now harder to come by, but these relationships are well worth the time they take.

Acquaintance → Friend:

Moving to the friendship stage will take some time and some patience. Every person is different. Sometimes it takes two to three contacts with a person, sometimes six to seven over a period of three to four months. There are exceptions of course. We have coached attorneys on this process who have gone out to lunch with an acquaintance one week and hit it off so well with the other person that they received a piece of business the very next week. It usually doesn’t happen quite that fast.”

On the board, Mark then wrote *2 or 3 contacts up to 6 or 7 contacts over 3 to 4 months*. Pencils scribbled furiously as he talked. Some hardcore information about this very soft subject! It felt like a formula! Maybe it would work!

An attorney spoke up from the back, his skepticism barely disguised, “Just what do you consider a ‘contact?’”

“Good question!” Mark walked back to the board and began to write.

“A ‘contact’ is a face-to-face meeting, a telephone call, a thank-you note, a lunch meeting, an invitation to a business event or an article clipped out of the paper sent along with a note that says ‘saw this and thought you might be interested.’ A contact is an invitation to dinner with spouses, tickets to a sporting event, a game of golf -- all the things you do with people who are personal or business friends. Contacts should be made based on what you know of the person’s personal preferences. If you share preferences, that’s even better. If you both like basketball or the opera, initiate those kinds of

invitations and go together.

If you don't share a particular interest, but you realize that it's important to the prospective friend, you can always give him two tickets and say, 'when we spoke last week you mentioned that you and your son really enjoy basketball, but hardly get to spend any time together. I have (or, our firm has) a couple of tickets to Friday's game. If you can use these tickets, please be my guest.' If there are no shared interests that you can play off of, invite the person to dinner -- almost everyone likes to eat!"

Friend → Referral Source:

Back at the board, Mark drew another arrow, this time from *Friend* to *Referral Source*.

"By far, one of the best moves you can make during this secondary period, and one that will accelerate the shift from friend to referral source more quickly, is to give that person a referral. If you were that estate planning attorney who we used as an example earlier, you could say something like, 'I have a client who is looking for tax advice and from what you have told me about your practice, I think you could really help him. I would like to send him over to talk to you. Are you taking new clients at this time?' This is a great way to open up the pipeline of referrals between the two of you and may naturally lead to more conversation about being referral sources for one another."

Mark moved to the center of the stage to make his point, "Remember that one of the best ways to turn someone into a referral source for you, is to be one for that person *first*."

A participant waved his hand and spoke. "Yeah, but sometimes I have no business to send to a prospective referral source. I don't see clients who are appropriate for that person's business. What do you do then?"

"If you can't send clients, try to introduce potential referral sources to other professionals with whom they can network. You could say, 'I would like you to meet this stockbroker whom I work with on a regular basis. I think it would be good for you to meet and network with her. We are meeting next Wednesday for lunch downtown. Would you like to join us?'"

If the person qualifies as an influencer for your business, then your referral sources or the organizations to which you belong must overlap at some point. If you look at your network, you probably can introduce them to someone who could be helpful -- it could even be to a temp agency that you have used and trust, or to a client of yours who is a business broker or to a Website designer. If you discover that sports is something you have in common, introduce them to your tennis pro or golf instructor. These are all gestures of friendship.”

This last piece of advice seemed to hit home with several members of the group who had felt in the past that if they couldn't send clients to new people, they were somehow out of the game.

Mark went on to explain more about how to make the shift from friend to referral source.

“This is a period in which you extend yourself with a hope, but not an absolute expectation, of something in return. You are investing a little time and energy and you are judging their response each time. If there is a genuine fit here, it should become evident in this period. When you offer someone something it does create a slight feeling of obligation on his part which could result in a tit for tat situation. But you cannot expect anything at first.”

A red-haired attorney sitting off to the side couldn't resist, “It sounds like dating to me! I thought I was all through with that!”

The group chuckled. Mark said with a smile, “You know, referral-based marketing really does have many of the same elements as dating. It is a courtship of sorts.”

“Especially the fear of rejection part!” someone else chimed.

“True again,” said Mark, glad that someone had voiced one of the main underlying reasons why attorneys will often not market themselves, not try to build new relationships. “Fear of rejection is always there, just beneath the surface for most of us human beings. But, what is the worst that can happen to you in this sort of scenario?”

The group was quick to respond. “Well, people might think that you want something from them. They might think you are being pushy or obnoxious in calling them all the time.”

“Yeah. Or they might think that you don’t really like them, that you just want their business.”

“These are legitimate fears.” Mark offered some additional guidance, “If you can’t find an inch of common ground with a new person, and it is not obvious to that individual that you could develop a mutually beneficial business relationship, it may not be worth pursuing. But use your judgement as you go along and don’t push if you don’t receive the appropriate signals. Here are some questions to ask yourself when building relationships with potential referral sources:

- ❑ Do they seem receptive?
- ❑ Do they return your phone calls?
- ❑ Do they take you up on your invitations?
- ❑ Do they reciprocate with invitations of their own?

If they turn down your invitations because they are busy, are they interested in rescheduling with you in the future? If not, that may be their way of communicating disinterest. People will let you know in many ways if they are receptive. You shouldn’t find yourself out on limb without having had signals along the way. And because you never quite know which of your potential referral source is going to respond in kind to your initiations, it helps to try to cultivate many people at once.

After a while, however, you can do what many of the Atticus-trained attorneys do when they reach a level of comfort with turning acquaintances into referral sources. They recognize that it is a two-way street. They come right out and say, ‘I think we could really help each other out by networking together. Why don’t we put our heads together and see if we can be marketing partners? I think I know people who can be good for your business and you probably know people who would be helpful for me to meet.’

This is what we call a mutually beneficial relationship. Many of the attorneys we have coached have gotten very comfortable in this role and actively seek out marketing partners. Some take it to a more formal level and meet every week. Some get together for lunch on a more informal basis and invite a new person to join them each time. They generate introductions for each other and have a good time doing it.

Just remember that it certainly helps if you have a genuine interest in the other person’s needs and goals. Remember that they are people just like you -- moms and dads, businessmen and women who have struggled to make their way, people who have

dealt with disappointment, who have good times and bad. Once you scratch the surface a bit you will probably find a pretty interesting person under there.”

The group looked thoughtful. We could see possibilities dancing in their heads. Some would be moved into action out of what they heard today. Some would have to hear it a few more times. But most were thinking about marketing in a new light.

Mark came close to the edge of the stage. “In closing, I want to reassure you about something. Turning an acquaintance into a friend and then a referral source -- which is what we’ve talked about today -- is not difficult. It’s not brain surgery. It takes the ability to reach out and develop new, *mutually beneficial* relationships with people. You learned most of the relationship-building skills you need in kindergarten. Now, just apply them more consciously, more strategically. And, most importantly, have fun while you’re doing it. You may think you can’t afford to take the time it takes to build new relationships. I say you can’t afford *not* to take the time. Your business will prosper and you might even find some of your acquaintances have turned into true friends!”

Mark Powers is the President of Atticus, the nation’s leading practice management education and training organization for attorneys. Shawn McNalis is Atticus’ head coach and curriculum director. For more information on Atticus seminars and programs, including Atticus Rainmakers, visit www.atticsonline.com or call 1-352-383-0490.