

Internal referrals

LED BY CLIENT DEMAND ←		→ DRIVEN BY FIRM CAPABILITIES	
REACTIVE “I cannot do this; do we have anyone who can?”	ACTIVE “It looks like this needs input on XYZ law, I’ll call my mate and introduce them”	ACTIVE “This is the sort of client XYZ team is looking for, I’ll call and introduce them.”	PROACTIVE “This is the sort of client the firm could do a lot more with ... here is the plan”.
Key issues How well do we understanding what colleagues do? Who do we trust?		Key issues Can we identify ALL the opportunities for this client? How do we introduce beyond circle of comfort?	
“My Client” Culture Silos Lack of trust Lack of accountability		“The Firm’s Client” culture Relationship building across practice areas Joint initiatives – legal/non legal Team approach Firmwide reporting Keep introducer in the loop Diversity of opportunity	
Management info Unstructured / minimal Dissatisfaction noted but not reported		Management info Structured via ‘Source of business’ report Gap analysis Connect to personal business plans and appraisals Incentive programmes	