



AMERICAN
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INSTITUTE

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Internal and External Referrals: How to Get and Use Them

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I. Your Brand

- Identify your brand.
- Know how it functions in a competitive landscape.
- Understand how to talk your brand but not necessarily in a purely sales context.
- How do you fit into and represent the brand?
- Are you the brand? Distinguishing the brand from the person.
- Are you identified with the brand? If so are you capitalizing on building trust in your brand?
- Exude confidence in your brand so that you can start to build a trusting relationship with those you want to use your services.
- Constantly evaluate your brand. Is it as vital today as when you began practice development? What has changed to make it better, stronger, more competitive?

II. Thought Leadership

- Knowledge is power and through knowledge you become an 'expert' and 'industry leader'.
- Being a thought leader builds credibility in you and the services you can offer clients.
- The more you demonstrate thought leadership the more you will become an expert or be perceived as one.
- Have industry knowledge beyond the scope of your practice area.

- Become a member or leader of industry organizations.
- Writing and lecturing as an enhancer to thought leadership enhances your brand.
- Be able to speak to key cases or situations that make you a stand out.
- Thought leadership enhances the person, and distinguished you from others in the competitive landscape.

III. Networking In General

- Know everyone but know key people and those who can get you to key people you want to know well.
- Keep it personal. The more you get to know someone the more you build trust and confidence.
- Keep the distinction between you and your brand clear but stay connected to your brand. Clients hire people not just firms.
- Diversify types of people you know so as to create connectivity at different levels. Someone they know knows someone you may want to know.
- Distinguish relationships. Know your 'friends', 'acquaintances' and 'professional connections'. All have value but some will be more important and dependable than others.
- Be meaningful in how you connect with other professionals. No one wants to feel like you connect with them simply to be used.
- Give back where you can. Refer business. Get involved in a referral source's charity. Co-author an article with another professional who you can help and vice versa.
- Confidence building means business. While your team has to perform, many times 'you' are being hired. Don't diminish the power of 'self;' when selling your firm's services.

IV. Client Development and Creativity

- Client development is a living thing. Evaluate it daily to see what you have accomplished and what you next need to do to make it better, different and more interesting.

- Know your audience. Know what they like. Know what will keep them interested. Know how to diversify yet be redundant in marketing that works.
- Lunch? Dinner? Ball games? Specialty events? One on one? Diversity in marketing keeps it interesting yet gets to all people you want to stay connected with.
- Evaluate your contact list. Who have you seen? Who have you not seen? Who do you need to re-connect with?
- Cold call if you have to but connecting through others is always best. Persistence is the key to success when trying to get introductions critical to your practice.
- Keep notes so you can trail how you are connecting with others? If you are not connecting with your contacts to stay front of mind you risk loss of market share.
- Keep it personal. Knowing more is better than knowing less. Birthdays, anniversaries, promotions, acknowledgment of professional accomplishments are all simple and unobtrusive ways to keep connected to your contacts.

V. Balance between Practice and Business Development

- Time is of the essence but the balance between doing a great job for your clients and client development is key.
- Know your business but in your work always keep an eye on practice building.
- Hire to build credibility in your brand and practice. Hire to help build your book of business. Hire to distinguish between the practice builder and the practice worker. Both help build brand power, awareness and credibility.
- There is no replacement for doing a good job. Others will spread the word but you planting the seed in ads, e-blasts and articles enhance what others can say on your behalf.
- Diversify, challenge and evaluate your model. Most businesses are cyclical. If you are not looking at your model to see how to make it better, different or more flexible your brand risks going stale.
- Boast your work. Create case studies and analysis to show you can not only talk the talk but you can get the job done. Brand reinforcement through getting the job done is the best marketing there is.
- Practice what you preach. Once confidence has been built with clients be sure you can deliver the goods. One mistake may be the last one you make for that client.

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Materials originally prepared for ABI Southwest Conference by Scott Stuart, Esq.