

THE REFERRAL SYSTEM AUDIT

If referrals suddenly stopped tomorrow... would you know why?

Take 2 minutes and assess the strength of your current referral system. Most law firms think they have a referral strategy. What they actually have is hope. This audit changes that.

STEP 1 OF 2

Is Your Referral System Broken?

6 Signs to Look For — Check Every Box That Applies to Your Firm Right Now

Score each sign: **0 = Not true** **1 = Somewhat True** **2 = Definitely True**

1 No Ownership

Nobody is specifically responsible for managing referral relationships at your firm.

Who owns this relationship at your firm?

☐

4 No Follow-Up Process

Your partners don't know what happens after they refer someone. The loop never closes.

What do you do within 48 hrs of receiving a referral?

☐

2 No Tracking

You can't see what's coming in or where it's coming from. No data = no strategy.

Where do you currently track referral activity?

☐

5 No Relationship Strategy

You're reacting to opportunities instead of creating them. Hope isn't a strategy.

What is your plan to deepen the top 3 referral relationships this quarter?

☐

3 No Cadence

You reach out when you feel like it, not on a consistent schedule. Reactive, not proactive.

How often do you intentionally touch each referral partner?

☐

6 No Referral Triggers

Nobody is specifically responsible for managing referral relationships at your firm.

Who owns this relationship at your firm?

☐

**YOUR TOTAL
SCORE:**

_ / 12

0-3

Solid foundation

4-7

Inconsistent system

8-12

Broken — fix now

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STEP 2 OF 2

Your Top 5

Not who you hope refers — who actually does. Fill this in honestly.

Referral Relationship Owner at Our Firm: _____

TOP 5 REFERRAL SOURCES	LAST OUTREACH	LAST REFERRAL	LAST THANKED	TRIGGER DEFINED? Y / N	REFERRAL TRIGGER to teach them
1					
2					
3					
4					
5					

HOW TO BUILD REFERRAL RELATIONSHIPS THAT ACTUALLY PRODUCE BUSINESS:

1

Educate on WHO

Give them triggers & red flags.

2

Easy Pathway

Make it simple & fast to refer.

3

Communicate First

Build before you need business.

4

Close the Loop

Always follow up after a referral.

5

Track Activity

Know what's converting & why.

6

Treat as System

Manage intentionally, not emotionally.

IF THIS EXERCISE EXPOSED OPERATIONAL GAPS, HERE'S THE NEXT STEP.

<https://thelawfirmleader.com/waitlist>