

# The Online COACHING CENTRE

**Workshop:** *business development*  
**Module:** *#16 – Developing business by ...finding referral sources*

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## Coaching

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### CONSIDER REFERRAL SOURCES.

Referral Sources are people who direct prospects, clients or additional referral sources to you.

Referral Sources are often called centres of influence. They would know many people and have some advisory relationship with them. Examples are investment advisors, accountants, doctors and insurance agents.

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## Mentoring

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Who are your Referral Sources now?  
 Who directs clients, prospects and other referral sources to you?

## About the OCC

The Online COACHING CENTRE (OCC) is LAWPRO's innovative online education tool. It lets you quickly and easily enhance a variety of "soft skills" that not only help you survive and thrive, but also help reduce malpractice claims.

The OCC is entirely Web-based, allowing lawyers across Ontario to use it at a time and place convenient to them. It is organized into six workshops, each of which contains approximately 25 learning modules, such as the one profiled on this page. Modules encourage self-teaching and self-evaluation; answers you provide when working in the modules should be saved for review at a later time.

To access the OCC, go to [www.practicepro.ca/occ](http://www.practicepro.ca/occ)

What are their common characteristics?

What more can you do to build your list of Referral Sources? Fill out the following chart to move through the four stages of personal services marketing to build your list of referral sources. The

four steps are Plan, Plant seeds, Cultivate and Harvest. The notes in the brackets are thought starters. Think about how people who are marketing to you, try to reach you.

Farming/Marketing Stage	Your New Activities	Do Date
Plan: Develop a list of who to target as referral sources (Who would be ideal?)	Who is on your target list? • •	
Plant Seeds to let them know what you want (Write, phone, lunch, get introduced)	What will you do to approach each person? • •	
Cultivate to build the relationship (Stay in touch regularly, write, phone, lunch, be actively patient etc.)	How will you cultivate the relationships? • •	
Harvest/Close (Listen, offer, be actively patient, tell them that you want them to refer to you)	Where and when will you let them know that you want them to refer to you? • •	