

# How to Thank an Acquaintance for Referring Business

*A February 2011 discussion on SoloSez, the email listserv for general practice, solo and small firm lawyers*

I want to reach out and thank my acquaintances for referring business to me, personally and to their friends/employers. I'm thinking about sending a handwritten note and a AmEx gift certificate.

How do I do that and look sincere? Any ideas?

Thanks

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First of all, check your state's ethics rules. Are you allowed to send a tangible gift? (In Virginia, we can't send anything "of value" to thank a person for recommending us. That includes even a de minimis gift.)

I think a handwritten thank you note is *\*always\** appropriate. Get some nice stationery with your name or initials on it. Write a short note that you appreciate them thinking of you, you'll treat the referred client with care, etc. Send it as soon as you can, so the referral is still on their mind too. Reward positive action quickly. :)

Whether or not you do more is up to you and your state's rules. Depending on the value of the referral (or potential value of their *\*future\** referrals), you might invite them to dinner or lunch. But in Virginia we certainly can't say that it's a thank you for the referral. You can of course use it as an opportunity to deepen the relationship. And pick up the tab.

For some great ideas on referrals, read *The Referral Engine*.

Have fun! Andrew

Andrew Flusche, Virginia

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The note is a great touch, how about something a little more personal than the gift certificate? We've started to send new clients a little gift tin of Coffees of Hawaii (<http://www.coffeesofhawaii.com>) along with a thank you note. It's not a big deal, but they

seem to enjoy and appreciate it and it's just a small token of how glad we are to have their business.

In the past I've occasionally sent clients (or referrers) gifts like a book I selected based upon known interests of theirs. Easy to get/send from Amazon.com and doesn't have to be expensive.

Disclaimer: Nothing says "Thank you!" better than "The Lawyer's Guide to Microsoft Outlook 2007". (Just kidding) (Sort of) And I've still never been a lawyer. (Really)

Ben M. Schorr

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Good point - we're not lawyers so we can send coffee (or books) without worrying about running afoul of any ethics rules. Except perhaps in certain states that frown on books. And science. And education.

Disclaimer: I'm married to a college professor so the state of education is a sore subject with me. And I'm still not a lawyer; think I mentioned that already.

Ben M. Schorr

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Yes, check your ethics rules.

The important thing is to thank the person. The more customized the better, of course, but it's really the thought that counts.

E.J. Hong, California

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Vendors of my former firm have given me everything from candy to cookies to candles to thank me for my business. Of course, I'm not a lawyer, so I can accept their gifts and move on. I think candles are nice though, if ethics rules allow.

Anna Collins Ford (not a lawyer, and kind of glad now that I know I can accept vendor's gifts without breaking any ethics rules)

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Personalized thank you cards. Forget the gift, or at least check your ethics rules. No payment, by gift or otherwise, to attorneys who refer matters in my jurisdiction.

I like to make my own cards for this purpose. My artwork on the cover, and firm logo on the inside.

David Masters, Colorado