

## **SLR Member Referral Guidelines**

Referrals are the cornerstone of SLR. The reporting process is easy and the tracking is done by staff.

### **There are several ways to report a referral:**

- Forward, BCC or CC an SLR staff member on an email to the destination lobbyist of the referral.
- Send a separate email to SLR staff with the referral details after a referral was made.
- Send a monthly report to SLR staff, or have one of your staff members send one on your behalf

Making the connection with a fellow SLR member in another jurisdiction counts as a referral, irrespective of whether the client hires the SLR lobbyist/attorney to which you are referring the client. What counts as a referral is the simple outreach to a fellow SLR member.

However, if the client does enter into a formal engagement with the inbound lobbyist, that information is helpful data to track as well. The inbound lobbyist should inform the staff of SLR if that occurs, and as a courtesy, should also inform the referring SLR member lobbyist.

### **Common practice for referrals:**

- Explain to the client that you are a member of the SLR network and the credible/extensive referral network to which it provides access.
- Letting the client know that you have a personal relationship with the SLR member lobbyist you are referring them to because of time spent with them at meetings. Giving them some context to the type of person you are referring them to helps.
- Notifying the inbound lobbyist that you are sharing their information with a potential client.
- Scheduling a pre-call with the inbound lobbyist to answer questions and place them in a position to win.
- If there is a conflict, it is expected to assist the referring member and the client to other qualified options in your state.
- It is essential to respond timely to referrals from members to respect their relationship with their existing client.