



THE REFERRAL MAPPING WORKSHEET

Turning Relationships into a Strategic Pipeline

Where This Fits in the Program

This worksheet is designed to be used **after defining your ideal case and refining your positioning.**

In the program, we established:

- Your niche defines what you do
- Your positioning makes it clear
- Your visibility ensures the right people remember it

This exercise focuses on the critical, often overlooked layer:

Who actually controls the flow of the cases you want

Because clarity without connection does not create a practice.

Why This Exercise Matters

Most neutrals think in terms of:

- “getting more cases”
- “being more visible”

But high-performing professionals think in terms of:

“Who brings me the right cases, and how do I become their first call?”

This worksheet helps you:

- Identify your **true referral ecosystem**
 - Understand what those professionals actually need
 - Position yourself as the **solution to their problems**
 - Create a targeted, intentional relationship strategy
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How to Use This Worksheet

- Focus on **quality, not quantity**
- Be specific, not general
- Think in terms of **real people, not categories**
- Write in practical, actionable language

This is not a networking exercise.

This is a **practice-building strategy tool**.

PART 1: IDENTIFY YOUR PRIMARY REFERRAL SOURCES

Start with the people most likely to bring you your ideal cases.

Your Top 3 Referral Sources:

1. _____
 2. _____
 3. _____
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For each, define:

Practice Area:

Type of Cases They Handle:

Experience Level (e.g., senior partner, solo, associate):

Reality Check

Are these the people currently referring you work?
Or the people you *want* to be referring you work?

PART 2: UNDERSTAND THEIR WORLD

This is where most professionals fail.

You must understand their pressures, not just your value.

For each referral source:

What pressures are they under?

- Time constraints: _____
- Client expectations: _____
- Case challenges: _____

What makes their job harder?

What do they need from a neutral in these situations?

Key Insight

You are not the solution to their case.
You are the solution to their problem.

PART 3: DEFINE YOUR VALUE TO THEM

Now connect your work to their needs.

Complete this:

“I help [type of attorney/professional] who are dealing with [specific challenge] by [what you do that makes their job easier or more successful].”

Refine further:

What do they gain by working with you?

- Efficiency: _____
 - Better outcomes: _____
 - Reduced stress: _____
 - Client satisfaction: _____
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PART 4: YOUR REFERRAL STRATEGY

Now we move from insight to action.

Where do these professionals spend time?

- Bar associations: _____
- Events: _____
- Online platforms: _____

- Professional groups: _____
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How can you show up in their world?

- Speaking: _____
 - Writing: _____
 - Content: _____
 - Direct outreach: _____
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What is your first step?

PART 5: BUILDING THE RELATIONSHIP

This is where most people default to networking.

You are building **professional alignment**, not casual connection.

How will you add value before asking for anything?

What can you share that is useful to them?

- Insights: _____
 - Case trends: _____
 - Practical tools: _____
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How will you stay top of mind?

AI SUPPORT: GUIDED PROMPTS

Use AI to deepen your thinking and refine your strategy.

Prompt 1: Identify Ideal Referral Sources

“Based on my ideal case description below, identify the top types of professionals most likely to refer these cases to me. Be specific about practice areas, roles, and environments.

Here is my ideal case:

[PASTE YOUR ANSWER]”

Prompt 2: Understand Their Needs

“For each of the following referral sources, help me understand their biggest pressures, challenges, and what they need from a mediator or neutral.

Referral sources:

[PASTE YOUR LIST]”

Prompt 3: Refine My Value Proposition

“Help me rewrite this statement so that it clearly communicates my value to a referral source, focusing on how I make their job easier or more successful.

[PASTE YOUR STATEMENT]”

Prompt 4: Develop a Relationship Strategy

“Based on the following referral sources and my ideal case, suggest a practical strategy for building relationships and becoming a go-to neutral for them. Include specific actions I can take.

[PASTE YOUR INFORMATION]”

FINAL INSIGHT

This is the shift:

- From “Who might refer me?”
→ to **“Who should be referring me, and why would they?”**

Closing Thought

“The strongest practices are not built on visibility alone.
They are built on being known, trusted, and relied upon by the right people.”

How to Use This Going Forward

This worksheet can be used to:

- Guide your networking strategy
 - Focus your visibility efforts
 - Shape your thought leadership topics
 - Identify speaking and writing opportunities
 - Strengthen relationships that drive your practice
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Bottom Line

You do not need more contacts.

You need the **right relationships, approached strategically.**