

Guide to Reporting Referrals

The best possible way to know if Mackrell International is working for its members is to be aware of the value of referrals that are being generated.

Why your firm should report

There are three reasons why you should report referrals to MI and invest in an internal system that will allow you to track and report referral numbers accurately:

1

To be able to sell the benefits of being a member of MI back to the stakeholders within your firm

Having a record of referrals will allow you to show in material terms (\$ value) the referrals that you have received from other MI members which you would not have otherwise received. Recording the information via our website will also allow you to identify the value of work you are sending out to other members.

2

To prove to other MI firms that your firm is a valuable member of the network who can handle their client's business overseas

Recording your referrals will show other member firms that you are a firm of high standing and quality who can generate outbound business for the network as well as deal with the inbound referrals from other member firms to the highest standard. To recognise your fellow members contribution to the network you should record details of both the sending firm and the value of the work.

3

To assist Mackrell International to grow as a worldwide network

If every firm reports all of their referrals, MI is able to show that the network generates business for member firms within Mackrell International. This assists the Membership Committee in being able to recruit new member firms around the world who have and want to do international business. This will increase the size of the network and allow the amount of referrals generated to continue to grow.

One very clear message we have received is that firms have problems tracking the referrals within their own office. To help we have provided our referral poster. Simply display the poster prominently in your office so that all of your colleagues and staff see the importance of MI to your firm. Insert the name of the person in your office who will be responsible for collecting and reporting the referral information so that everyone knows who to report the information to.

Make sure the person responsible for referral reporting has these instructions and knows what is needed to maintain a comprehensive referral record to submit to Mackrell International – remember HQ are always here to help so do ask for advice if you need it.

It is vital that everyone contributes to this process so that we may have a truly accurate measure of what the network is exchanging in terms of business and referrals.

An example of how to set up an internal referral tracking system for your firm:

Provided by BTO - our member firm for Scotland

In relation to internal referrals which become active pieces of work, we have a Source of Business code which must be attributed to each new client of the firm. That code then applies to each matter opened for that client. That source of business code enables us to track the source of introductions to the firm and specifically includes Mackrell International. Reports can be run from the system listing all clients and matters from each Source of Business code.

In relation to enquiries which do not become billable pieces of work, then all of the fee earners in the firm know that they are required to let our main MI main contact know, even if simply by copying into an email as part of the chain, of such enquiries so that we can log them.

In relation to outgoing referrals, then, as above, fee earners are instructed to copy our MI main contact into any part of the email chain so that such outgoing referrals can also be logged.

We hold regular marketing sessions for all fee earners in the firm at which these points as well as others are brought up. We also publish at the beginning of each year a series of New Year's Resolutions which remind people of these points. It also forms part of our "marketing" induction given to new arrivals.

As a management tool, we are keen to ensure that our membership of Mackrell International remains of value to us and therefore we monitor incoming and outgoing referrals regularly, with a report being made to the Partners of the firm every few years. It is therefore important to us that we have accurate management information to enable a proper decision to be taken.

Reporting your referrals:

By entering the member login area of our website www.mackrell.net you can access the referral reporting site.

Your user name and password is:

You are able to:

- Report referrals both retrospectively (for the previous half year) or real time (for work you have billed today)
- Differentiate between new business and existing business
- Edit and delete an entry and print your own entry
- View previous submissions and summaries of your referrals
- View who has billed or recorded the referrals that you have sent to them

At our AGM we provide a printed summary of all reported referrals between all members. It always makes for interesting reading and we are sure that you will shortly be showing up as a sender and receiver of referrals.

Please ensure that your firm's referral information is available for all other delegates to see at our next AGM.

Thank you. If you require any assistance please just email mackrell.hq@mackrell.net

How to report referrals, step by step:

A From the website menu select Member Resources and Login (A). Click Report Referrals (B). Please login using your allocated admin username and password (C). If you need to be reminded of these please contact Mackrell HQ - mackrell.hq@mackrell.net

B Once logged in to the referrals hub (D) you can navigate to pages to add incoming or outgoing referrals or see summaries of either.

C **Incoming Referrals:** You can add incoming referral data here, please turn over the page for specific instructions on how to do this.

D **Outgoing Referrals:** You can add outgoing referral data here, please turn over the page for specific instructions on how to do this.

E **Incoming Summary:** You can view the summary of referrals you have received from other firms. Here you can also enter comments about a particular referral if you wish. (G)

F **Outgoing Summary:** You can view a) the number of referrals you have reported that you have sent out and b) the value of referrals that other members have reported that they have received from you. Here you can also enter comments about a particular referral if you wish. (G)

G Use the links in the top right (E) to navigate to Incoming Referrals, Outgoing Referrals Incoming Summary and Outgoing Summary

Incoming referrals - data entry

MI Online Referrals Incoming Summary Outgoing Referrals Outgoing Summary

Incoming Referral

This page is for referrals that have been received by you from another member firm. Please use the data fields below to inform us about any incoming referrals that your firm has billed in this period.

Any Nil referrals MUST be entered

You may enter data in real time (immediately on completion of the work during the appropriate half yearly reporting period), or in bulk, after the end of the half yearly reporting period.

Referral Information

Date
Please enter the date you billed/invoiced the client for this work.
Wed Nov 12 2014 (1)

Referral from
Name of the firm that sent you the referral.
Crowley Millar Solicitors (2)

Area of law that best describes the referred work.
Area of law: Litigation (3)

Reference
Manor Merger (4)

Value of incoming referral. Whole numbers only, no decimals, no pence or cents. No ',' or '.'.
Value: 4400 (5) US Dollar (USD) (6)

Type of Referral
Please indicate the type of referral. Hover over the box for an explanation. You may only select one option.
 Brand new client New matter for existing client Ongoing matter for existing client (7)

Save Add another referral (9)

10

You must enter referrals information even if you have not received any, see below.

Data entry requires that you complete seven pieces of information:

- 1 - Use the reporting date calendar (1) to enter the date of the referral, either real time or retrospectively.
- 2 - the firm you received the work from. If you have received no referrals, enter 'No referrals received' (use the drop down) (2). There is an option at the bottom of the list to enter 'Other', where the business you have received came through a Mackrell source but they are no longer a member of Mackrell International).
- 3 - the area of law (use the drop down) (3).
- 4 - a reference for your own internal use (4).
- 5 - the value in your currency (whole numbers only), **you must enter a figure even if is 0** (5), use the drop down to convert this to US dollars (6).
- 7 - the type of referral, be it for a brand new client, a new matter from an existing client or an ongoing matter for an existing client. Hover over the titles for more information (7).
- 8 - Save your entry (8).
- 9 - Add an additional incoming referral here (9) until they are all entered. The sum of your referrals will be automatically totalled and can be viewed on the 'Incoming summary' (10).

On the **incoming summary** you can also enter comments about a particular referral if you wish.

Outgoing referrals - data entry

MI Online Referrals Incoming Referrals Incoming Summary Outgoing Summary

Outgoing Referral

This page is for referrals that you have sent to other member firms. Please use the data fields below to inform us about any outgoing referrals that your firm has sent out in this period.

Any Nil referrals MUST be entered

You may enter data in real time (immediately on completion of the work during the appropriate half yearly reporting period), or in bulk, after the end of the half yearly reporting period.

Referral Information

Date
Please ensure you enter data for the correct time period.
Wed Nov 12 2014 (1)

Referral to
Name of the firm that sent you the referral.
Danckelmann u. Kerst (2)

Area of law that best describes the referred work.
Area of law: Litigation (3)

Reference
Smith Co (4)

Number of outgoing referrals to this firm for the area of law you have specified above.
Number of outgoing referrals: 1 (5)

Save Add another outgoing referral (7)

8

Data entry requires that you complete five pieces of information:

- 1 - Use the reporting date calendar (1) to enter the date of the referral, either real time or retrospectively.
- 2 - the firm you sent the work to. If you have sent no referrals, enter 'No referrals sent' (use the drop down) (2).
- 3 - the area of law (use the drop down) (3).
- 4 - a reference for your own internal use (4).
- 5 - the number of referrals sent you have sent to this member firm in this area of law (5), **(you must enter a figure even if it is 0)**.
- 6 - Save your entry here (6).
- 7 - Add an additional outgoing referral here (7) until they are all entered. The total number of referrals will be automatically totalled and can be viewed on the 'Outgoing summary' (8). On the outgoing summary you can also enter comments about a particular referral if you wish.

On the **outgoing summary** you can also enter comments about a particular referral if you wish.

This **firm** is a member of **Mackrell International**

www.mackrell.net



Mackrell International is a **worldwide network** of independent **legal firms** that **refer work** to each other.

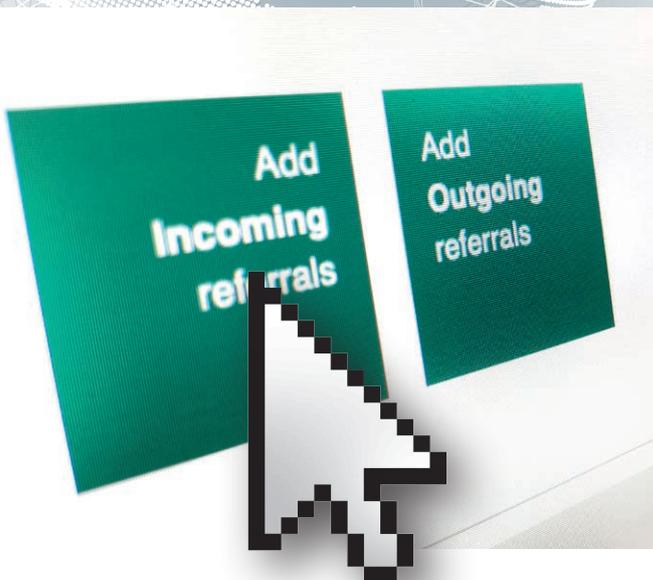
What does this mean to you?

Membership enables this firm to provide our clients with legal services at home and abroad and to receive business referrals from other members of the network.

It is essential that Mackrell International maintain a correct record of these referrals in order to attract new member firms into the network and therefore increase referred business to this firm.

If you refer a client to a Mackrell International firm or if you receive a referral from an MI firm this must be reported to MI.

The person in charge of recording MI referrals at this firm is:



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