

Obtaining references for bids - outline questionnaire for marketing and business development professionals

Here is a useful questionnaire or script to guide you as you obtain references from willing individuals who haven't the time, or perhaps inclination, to do all the work attached to preparing their own written reference. The idea is that you, as a member of your law firm business development and client service team, run through this quick questionnaire with your prospective referee, offer to draft a reference for their consideration, and then submit it to them for amendment and approval.

Questionnaire script

Select as many of the following questions as you believe appropriate for the referee. Record verbatim responses to ensure the reality and authenticity - so important.

Introduce yourself with "Good morning/good afternoon.

I'm NAME from NAME OF FIRM and I understand that WHICH PARTNER has arranged for me to speak with you regarding a reference.

Perhaps by running through a few questions with you, I can put together a draft reference for your consideration, comment, and approval. It won't take long. Can we make a start, please ?"

Use questions selectively as prompts:

- Can you tell me something about the background to your relationship with our firm, and the circumstances under which you have worked with PARTNER NAME and his/her team ?
- Which of our legal services do you use ?
- What other services do you use from our firm ?

- Please tell me about the expertise of PARTNER NAME and his/her team in dealing with the issues which arise in your matters.
- Can you comment on how they meet your service standards, their dependability, and their ability to work to deadlines, please ?
- Please tell me about how you find PARTNER NAME and his/her team in terms of communication and accessibility ? Are you kept properly up-to-date ?
- How would you describe the approach they take to their work with you ?
- How well does s/he appreciate the challenges you face ?
- What are your key concerns and how does PARTNER NAME help you with these ?

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- Please comment on the strategic value added by PARTNER NAME and FIRM NAME.
- What is your assessment of PARTNER NAME's effectiveness in resolving matters quickly and at a minimum expense for you ?
- How effective is s/he in negotiating on your behalf ?
- Please comment on PARTNER NAME's recognition, avoidance, and resolution of conflicts of interests.
- How cost effective is FIRM NAME for you ?
- Have you any input about the value for money we deliver to you ?
- How does FIRM NAME compare with other legal service providers you have used ?
- How does this value for money compare with these law firms ?
- Have you observed the effects of our quality programme in action ?
- Please comment on the areas where PARTNER NAME has added value to the business relationship with special services or "extras".
- Do you find that we are consistently easy to deal with ?
- How well do we manage the relationship with you ?
- What are the key differences and your experience of working with our firm compared with others ?
- Why do you favour FIRM NAME ?
- In what circumstances would you recommend us to other prospective clients ?

You will be able to elicit plenty of valuable feed back to turn into references and testimonials