

Obtaining references to support public sector tenders Outline questionnaire

Here is a useful questionnaire or script to guide you as you obtain references from willing people who haven't the time, or perhaps inclination, to do the work attached to preparing a written reference off their own bat.

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 for their amendment and approval.

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

Introduce yourself with "Good morning/Good afternoon. I'm ... NAME ... from ... FIRM ...and I understand that our partner ... NAME ...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 you consideration, comment, and approval. It won't take long. Can we make a start, please ?"

Use questions selectively. Record responses verbatim.

Can you tell me something about the circumstances under which you have worked with ... NAME ... and his/her team ?

What kinds of matters have you been working on together ?

Please describe the expertise of ... NAME ... and his/her team in dealing with the issues which arise in your projects.

How do you find ... NAME ... in terms of communication and accessibility ? Are you kept properly up-to-date ?

How would you describe the approach s/he takes to his/her work with you ?

How well does s/he appreciate the challenges you face ?

How does ... NAME ... help you with these ?
What is your assessment of ... NAME's ...effectiveness in resolving matters quickly and at minimum expense ?

Please comment on our recognition, avoidance, and resolution of conflicts of interests.

How cost effective are we for you ?

Have you any input about the value for money we deliver to you ?

How do we compare with other law firms with whom you have experience ?

How does our value for money compare with those law firms ?

Have you observed the effects of our quality

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programme in action ?

Please comment on the areas where ...
NAME... has added value to the relationship
with your agency with special services or
"extras".

Are we consistently easy to deal with ?

How well do we manage our relationship
with you ?

Are we a good fit for the public sector ?

What are the key differences and your
experience of working with our firm
compared with others ?

Why do you favour ... NAME ... and this
firm ?

In what circumstances would you
recommend us to other agencies in the
public sector ?