

The Past-Client Playbook: Turn Clients You Already Won Into Referrals, Reviews, and Repeat Matters

You already did the hard part. You took the case, fought it, and got the client paid. Then the file closed and you never talked to them again.

That is the most expensive mistake a personal injury firm makes. The people who already trust you are the cheapest, fastest source of new matters you will ever have, and most firms walk away from them the day the check clears.

This playbook is the whole process. The exact sequence, the timing, the messages, word for word. Run it yourself. Or have us run it. Either way, stop leaving these cases on the table.

PLAYBOOK

The dream outcome

A steady stream of referral consults and 5-star reviews from people you already served. Not cold clicks. Not paid leads who call to vet you. People whose cousin just got rear-ended and who already told that cousin to call you before you ever picked up the phone.

That is what a working past-client list produces. A referral does not arrive at "awareness." It arrives at "trust." It is calling to book, not to shop.

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Why past clients are the best and cheapest source of new matters

The numbers are not close.

Referrals close at a different level than cold leads. Firms report closing rates as high as 95% on clients who come from a trusted referral, against roughly 35% for prospects coming off the internet ([Lawhustle](#)). When a referral calls, someone they trust already vouched for you. They are not vetting. They are booking.

Acquiring a stranger costs 5 to 25 times more than keeping someone you already have ([Harvard Business Review](#)). Every dollar you put into Google Ads is fighting that math. Your past-client list already paid for itself.

Referred clients are worth more and stick around longer. They have a 37% higher retention rate and a 16% higher lifetime value than clients from any other channel ([GrowSurf](#)). For a PI firm, that is repeat matters and a referral chain, not a one-and-done file.

People trust a recommendation from someone they know above everything else. 92% of consumers trust referrals from people they know, and a person is 4 times more likely to hire when a friend sends them ([Nielsen, via GrowSurf](#)).

Reviews work the same way. They are a referral that works while you sleep.

87% of people check online reviews before choosing a lawyer, and 84% trust an online review as much as a personal recommendation ([Law Webber](#)). Star rating is the single most-weighted factor in how a stranger judges your reputation, and 65% of people say reviews from former clients shaped their hiring decision ([iLawyerMarketing](#)). One more star can move conversions about 10%.

So here is the gap. The asset is sitting right there, and almost nobody asks.

Over 70% of customers will leave a review when a business asks them to ([Search Engine Land](#)). 83% of the people asked this year went on to leave one, and only about 6% say they would not write a review at all ([BrightLocal](#)). The bottleneck is not willingness. The bottleneck is the ask.

Most firms never ask because the case is over, the file is closed, and nobody owns the follow-up. The referral that would have come "a few years down the road" never comes, because you went silent and the client forgot your name. That is the whole problem. It is fixable.

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The Playbook

Here is the sequence. It runs across three channels (voice call, email, text), it is built on permission, and it never asks a person for something they are not ready to give. The order matters: thank, then review, then referral. You earn each step before you take the next.

When to reach out

Time it to the win, not to your calendar.

- **The right moment is after the matter resolves and the client is satisfied.** For PI, that is at or just after settlement, once the client has the outcome in hand. Satisfaction is highest right after they get paid. That is when a recommendation is most sincere ([CloudLex](#)).
- **Do not ask mid-treatment or before the check.** A client still in pain, still waiting, has nothing good to say yet. Asking early reads as tone-deaf and burns the relationship.
- **Then stay in touch over time.** The referral often does not come the week of settlement. It comes the day their neighbor gets hurt, which could be next year. A short check-in every few months keeps your name in their head for the moment they actually need to pass it on.

The sequence at a glance

Step	Timing	Channel	Goal
1. Thank + close the loop	3 to 7 days after settlement	Voice call, then text recap	Confirm they are happy, surface any problem early
2. The review ask	1 to 2 weeks after, only if step 1 was positive	Text with direct link, email backup	One genuine 5-star review
3. The referral ask	3 to 4 weeks after, after the review	Email or voice, warm and specific	Permission to be the firm they send people to
4. The stay-in-touch loop	Every 3 to 4 months	Email or text	Stay top of mind for the referral that comes later

Step 1: Thank and close the loop

Goal: confirm they are happy and catch any unhappiness before it becomes a 1-star review. This step earns the right to ask for anything.

Channel: a real voice call, then a text recap. Call first because a human voice after a win lands. Keep it short. Listen more than you talk. If a voice agent makes the call, it discloses it is an assistant up front, follows the client's lead, and never talks over them.

Voice script:

"Hi [Name], this is [Firm] calling about your case. No action needed, I just wanted to personally say congratulations on the settlement and thank you for trusting us with it. How are you doing? ... Is there anything that did not go the way you hoped? ... Glad to hear it. We are always here if anything comes up. Take care."

Text recap right after:

"Great talking, [Name]. Congrats again on the settlement. If you ever need us, we are one text away. Reply STOP to opt out anytime."

If they raise a complaint here, you handle it as a service issue and you do not advance to the review ask. That is the point of going first.

Step 2: The review ask

Goal: one honest 5-star review, because 87% of your next clients will read it before they call you.

Channel: text with a direct link, email as backup. Texts get opened. The single biggest reason people do not leave a review is friction, so remove every step. Send the direct Google link. Do not make them search.

Text:

"Hi [Name], so glad we got you a good outcome. Would you take 60 seconds to share your experience? It helps other people who are going through what you went through find help. Here is the direct link: [Google review link]. No worries if not. Reply STOP to opt out."

Email backup, a few days later if no review:

Subject: A quick favor, [Name]

Hi [Name],

It meant a lot to help you through your case. If you have a minute, a short review of your experience would help the next person who is hurt and does not know who to trust. It is the main way people find us.

Here is the link: [Google review link]

Thank you either way.

[Attorney name]

Make it specific to their win. "So glad we got you a good outcome" beats a generic "leave us a review" every time. Ask once, ask warm, do not nag.

Step 3: The referral ask

Goal: become the firm they send people to. Not a hard sell. A standing offer.

Channel: email or a short call. Do it after the review, never before. Asking for the review first proves you care about their experience, not just their address book.

The script is built on one move: make it easy and make it specific. Do not say "send us anyone." Name the situation.

Email:

Subject: One thing before we close your file

Hi [Name],

Your case is wrapped and we could not be happier with how it turned out for you.

One ask. If a friend or family member is ever in a car accident or gets hurt and does not know what to do, we would be honored if you pointed them to us. Most people have no idea who to call in that moment, and a name from someone they trust changes everything.

No pressure and no expiration. We are here whenever you or someone you know needs us.

[Attorney name]

[Direct line]

This is where the chain effect starts. A happy client sends their cousin. The cousin closes at a referral-level rate because they arrived already trusting you, retains better, and a year later sends their coworker. One satisfied file becomes three. That is the entire engine, and it only runs if you make the ask.

Step 4: The stay-in-touch loop

Goal: be the name they remember when someone they know gets hurt next year.

Channel: a light email or text every 3 to 4 months. Not a newsletter nobody reads. A short, human check-in.

"Hi [Name], no reason other than to check in and hope you are doing well. If you or anyone you know ever needs us, we are here. Reply STOP to opt out."

Most referrals are not same-week. They are dormant until the moment of need. This loop keeps you top of mind so that when the moment comes, yours is the name that gets passed along.

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Common mistakes and the guardrails that prevent them

Most firms get this wrong in the same few ways. Each one is avoidable.

Never asking at all. The biggest mistake by far. 70%+ would leave a review and your best clients would refer, but the file closed and nobody owned the follow-up. The fix is a defined sequence with an owner, so the ask actually happens.

Asking at the wrong time. Asking for a referral or review mid-case, before the client has their outcome, reads as tone-deaf and damages trust. Time it to the win.

Asking for too much, too soon. Leading with "refer us your friends" before you have even thanked them is backwards. Earn each step. Thank, then review, then referral. One ask per message.

Making it transactional. "Leave us a review and we will enter you in a drawing" cheapens the relationship and creates ethics problems. The ask works because it is genuine. Keep it human, keep it specific to their case, and ask for the favor straight.

Talking over the client. On a call, the worst move is an agent or a person who steps on the client, rushes the script, or interrupts. After a win, people want to be heard. The agent listens, follows the client's pace, and never talks over them. An interruption here costs you the review and the referral both.

Ignoring compliance and ethics. This is permission-based outreach to people who already know you, which is exactly why it is allowed, but the rules still apply.

- **Attorney solicitation rules favor you here.** ABA Model Rule 7.3 bans live solicitation of strangers for the firm's financial gain, but it carves out anyone with a "prior business or professional relationship with the lawyer or law firm" ([ABA Rule 7.3\(b\)](#)). Past clients are exactly that. The logic: someone who already worked with you has a real basis to judge whether to send you a referral, so the protection that shields cold prospects does not bind here. Check your state's equivalent, because state rules vary, but the past-client relationship is the standard exception.
- **TCPA windows.** Calls and texts go out only inside 8am to 9pm in the client's local time. No off-hours contact, ever.
- **DNC and opt-out.** Scrub against do-not-call lists, and the moment someone says stop, it is over. Every message carries an opt-out and the opt-out is honored immediately.
- **California bot disclosure and CAN-SPAM.** A voice agent discloses it is an assistant up front. Emails carry a real sender and an unsubscribe. These are not optional.

No script approval. The firm's name is on every word. The attorney approves every script and message before anything goes out. No surprises in your voice.

No summary written back. If you do not capture what happened on each touch (who was happy, who complained, who said yes to a referral), you are flying blind and you will repeat the same ask to the same person. Every call and message gets summarized and written back so the firm has a record and the relationship moves forward, not in circles.

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The honest close

This is exactly the process we run.

We are BookedBack. We do done-for-you past-client reactivation and intake for personal injury firms. We work your own list across AI voice call, email, and text, run the sequence above, qualify the people who respond, and book the referral consults straight onto your calendar. Every script is yours to approve. Every conversation gets summarized and written back to you. TCPA windows, DNC scrubs, opt-out, and bot disclosure are built in, not bolted on.

It is performance-based. Your first appointment is free, then \$50 to \$300 per booked consult that actually shows up. A 100-lead pilot. Nothing upfront. Cancel by text.

You can run this playbook yourself. Everything you need to do it is on this page, on purpose. We give it away because we only want to work with firms who would rather have us run it than run it themselves. If that is you, [\[start a pilot here\]](#)[\(/contact\)](#).

Either way, stop walking away from the clients you already won.

Want BookedBack to run this for you?

We run this exact process across AI voice, email, and iMessage on your own lead list. Your first booked appointment is free. After that you pay only when an appointment shows up, \$50 to \$300 each depending on volume. No software fee, no setup fee, cancel by text.

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