THE NEW ELLIS GROUP

# Monday Monday

*Connecting the Dots with Karen Kaplowitz*

*Helping you create and reinforce the habits of successful career building, gleaned from my work as a business development strategist, trainer and coach*

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**Preparing to "Sell" Cross-Selling.** Cross-selling — selling additional services to existing law firm clients — is one of the most promising strategies for legal marketing. With existing clients, the firm is already on approved counsel lists; conflicts have been vetted; clients have agreed to the firm's general fee structure; and the firm has client access through one or more client relationship partners. But it is often the case that the client relationship partners do not know what other firm lawyers could do for existing clients. You cannot assume that your colleagues know what you do or understand how it applies to their clients. To establish potential cross-selling opportunities, here are some foundational steps to consider:

- Identify the characteristics of your best prospects by industry, typical problems, or otherwise.
- Ask the marketing staff for a list of clients with these characteristics plus the name of the client relationship partner and the amount of business the client does with the firm.
- Coordinate with your practice group. You will get greater access to the data you need and can avoid competing for cross-selling opportunities with other lawyers in your own practice group.
- If your staff cannot break out a segmented list for you, get whatever list of clients is available.
- Select your top priorities, preferably clients whose relationship partners know and trust you.
- If the relationship partners are clustered in one office or one practice group, ask to make a presentation on the work you do to that group and how it is relevant to their clients. Make sure the date is convenient to the relationship partners of the highest priority clients on your list.
- For each priority client, also schedule meetings with their relationship partners. Before each meeting, research everything you can about each client. Information on the clients' business and legal issues may be available from public filings and news media. Tap your firm's marketing staff or library for help.
- In each meeting, discuss what you have learned independently about their clients' potential needs for your services and what specific steps they are willing to take to introduce you to the client or explore the clients' needs in your area.
- Follow up persistently just like you would with an external client prospect. Send information, look for opportunities to meet your colleagues with or without their clients, track information about their clients, and help them look good to their clients.

If opening more cross-selling opportunities is a priority on your business plan this year, it is important to have a structured game plan and not just a line item on the agenda of periodic practice group meetings.

**Example:** A practice group leader did an analysis of which lawyers in other firm practice groups had historically referred the most work to her group. At the next practice group meeting, the leader shared the information with the group and recommended that they look at other partners in the same practice groups who had not referred work to them. The practice group leader met with her counterpart in the other practice group to discuss which of the non-referring partners who had significant client relationships were the most promising. The practice group leader then assigned the most promising non-referring partners for follow up to a group of volunteers in the group who were tasked with research and follow up meetings.

Have you done the foundational analysis, research, and follow up to implement a cross-selling strategy for your services to existing clients of your firm?

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