



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*

Volume 11, Issue 9

April 17, 2017

A Tool for Measuring Collaboration. Most professional services firms seek to broaden their relationships with their best clients. The most successful firms excel at building both broad and deep client relationships. Cross-selling strategies are the holy grail of business development. But not all partners are effective at identifying client needs and helping their colleagues sell services to their clients. It's easy to assume there are just two kinds of partners – those who cross sell and those who don't. Chris Paskach of The Claro Group offers a useful, more nuanced framework, with four levels of performance by lead relationship partners:

Level 1 – Active Resistance – “Gatekeeper”

These partners consider “their clients” to be personal property and keep colleagues at arm's length to avoid having their valuable relationships damaged. They may believe that getting colleagues involved introduces unnecessary risks to their relationships, so they avoid the problem by setting themselves up as the “single point of contact” with the client. While this may help them protect their relationships from their colleagues, it actually increases the possibility that competitors will gain a foothold at the company and increases their long-term relationship risk.

Level 2 – Passive Indifference – “Bystander”

Former gatekeepers, especially after being told it's a firm strategy to cross sell, may advance to the bystander level. They don't require their colleagues to go through them in any contact with their clients but they won't go out of their way to help them understand the culture or navigate the client's RFP or procurement processes. They simply stand back and wish their colleagues well. Some may even tell their colleagues that they won't interfere as long as they don't mess up the incumbent partner's relationships. This is better than a gatekeeper, but far below optimal performance.

Level 3 – Passive Assistance – “Cheerleader”

This partner is happy to tell a client about a colleague's capabilities and let them know if there's any interest. They may say something like “what would you like to present to my client?” If there's a good fit, this level of relationship development may be all that's needed to expand the firm's relationships. But it still falls far short of the fourth and most effective level of relationship management.

Level 4 – Active Assistance – “Collaborator”

At this level, the lead relationship partner is actively engaged with the client, listening for business issues that could benefit from the firm's services. Collaborators take the initiative to understand the nature and value of their colleagues' services, seek out opportunities to make introductions, and coach their colleagues through the client's culture and procurement processes. When a firm recognizes and rewards these behaviors, they find more of their partners performing as collaborators as their firm grows and prospers. Firms of collaborators have the broad and deep client relationships that are more profitable and defensible when markets become more competitive.

How would you evaluate yourself and your firm on these levels of collaboration? Would your partners agree with your assessment of yourself? Is your firm investing in encouraging partners to move up the continuum and rewarding the most collaborative partners?

[Chris Paskach](#) is a Managing Director at The Claro Group where he is a leading expert in data analytics and eDiscovery services. He previously led the National Forensic Technology practice with over two hundred professionals at a Big Four firm.