



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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## Is Cross-Selling Really a Part of Your Growth Strategy?

Cross-selling -- selling additional services to existing clients -- is a frequent topic in firm-wide, practice group, and individual business planning sessions. Many firms have cross-selling mandates to take advantage of new practices and geographies added by recent mergers and lateral hires. Many laterals have joined new firms expecting introductions to the firm's existing clients. In each case, the question is the same: are opportunities for cross-selling a myth or a reality? The answer depends on whether cross-selling is being welcomed or ignored. If you are really committed to implementing a cross-selling initiative for your firm, your office, your practice group or your own practice, here are some questions to consider:

- Who in the firm has demonstrated a commitment to growing work from existing clients by concrete plans to introduce their clients to new lawyers, practice groups or offices in the firm?
- Is there a process in place to identify and showcase successful examples of cross-selling initiatives? Who is responsible and how is the information communicated internally?
- If you, your practice group or your office are interested in access to clients controlled by other firm lawyers, have you identified clients you control who may be of interest to them?
- Have you adopted a "wait and see" attitude about introducing your clients to other lawyers in the firm? Are you holding back until others refer work to you from their clients?
- When you refer clients to other offices or practice groups, do you provide them guidance on your clients' and your own expectations for keeping you informed?
- Have you considered what you need to know about other attorneys in your firm to be comfortable and confident enough in introducing them to one of your clients?

To make cross-selling more than lip-service in annual plans, it is important to lead by example. If an executive committee mandates cross-selling, committee members need to be involved on behalf of their own clients. When practice group leaders champion cross-selling to another practice group, they need to reciprocate with clients in their practice group. When office leaders encourage other offices to refer work to their offices, they should be ready to make reciprocal introductions to the other offices.

**Example:** When her firm leadership encouraged more cross-selling, the office managing partner for a European city put in place several procedures. First, she asked lawyers in other offices to inform her of their visits. She then sent a list of her office's major clients to the visiting lawyers. She invited the visitors to make time for a reception to meet lawyers in her office and asked if they would like to do a CLE presentation for lawyers and clients. She also asked if a lawyer in her office could assist the visiting lawyer on their matter. For each visiting lawyer, she also obtained a list of their clients and asked the marketing staff to research if those clients had facilities or did business in her country. She also asked the staff to research if lawyers in her country had billed any time to those clients and made sure that those lawyers were aware of the impending visit. She also circulated information about each visiting lawyer and their clients and asked local lawyers if there were local clients who they thought would be interested in meeting the visiting lawyer. Over time, these practices helped deepen familiarity and trust between lawyers in her office and others in the firm and led to many new engagements.

Are you taking the necessary preliminary steps to make the goal of cross-selling a reality? If you hope other lawyers will introduce you to their clients, are you showing good faith by looking for opportunities for them? Will you be a leader who gets the cross-selling ball rolling in your firm?