



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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A Simple Tool to Support Cross-Selling and Lateral Integration

One regular frustration for lawyers is the failure of their colleagues to introduce them to their clients. Laterals frequently are disappointed when their new partners do not follow through on promises of client introductions which were used to recruit the lateral. Lawyers -- and law firm leaders -- also complain when partners will not open doors for lawyers in other practice groups to meet clients. At the same time, client relationship partners often feel deluged by requests from other lawyers for introductions to their clients. They are reluctant to burden clients who suffer from [lateral fatigue](#) and complain about the incessant efforts of lawyers to meet them. Many lawyers give up on meeting existing firm clients and find it easier to access clients with no ties to the firm. If you face any of these challenges, here is a concept to make introductions among lawyers more manageable: a master calendar for each office which lists meetings, depositions, and other events which are taking place in the office. A master calendar would ease many of the tensions around introductions. To be useful, the master calendar should include the following information:

- The nature of the meeting or event and the time, duration and date.
- The names and titles of each attendee with an identification of clients.
- The name of the lawyer who is hosting the gathering.
- The name of the client relationship partner if the host is not that person.

Preparing the master calendar should be the duty of the people who assign conference rooms so that providing this information is part of the process of getting the space and less easily avoided. There should however be exceptions if the meeting or name of the client must be kept strictly confidential. The master calendar should be available to all partners who can then track when clients they want to meet will be in the office. It is simply much easier for a client relationship partner to arrange a brief introduction or short meeting to introduce a new lateral or another partner to a client if the client will be in the office. It is also less of a burden on the client which is essential. This approach will not work in all situations but establishing a simple process to facilitate more introductions to existing clients would go a long way toward eliminating tensions about introductions.

Example: When a new lateral arrived, she sought out one of the partners who had recruited her and had described a client who could use her services. The lateral reminded the partner of their discussion and asked a simple question: was there an occasion coming up when the client would be in the office, so it would be easy for the new lateral to stop in and meet the client? The partner expressed his appreciation for her inquiry. He said that there were no plans for the client to be in the office but that there were depositions coming up in one of their cases which the client was likely to attend. The partner suggested that the new lateral check with his assistant or check the office master calendar for meetings in the office. The lateral's suggestion that the partner make an introduction in conjunction with the client's visiting the office greatly increased the odds that an introduction would take place.

If you are looking for access to other lawyers' clients or you are a practice group leader who is trying to stimulate more cross-selling opportunities, can you use some simple tools, like an office master calendar, to improve your odds?