



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 13, Issue 22

November 4, 2019

It's Not Too Late for Your 2019 Cross-Selling Strategy

If one of your practice group's strategies for 2019 was to cross-sell your services to other clients of the firm, you have undoubtedly already mapped out and executed many of the steps you needed to take. You identified firm clients who could use your services; you considered which client relationship partners were most likely to be collaborative based on your own experience and their reputations in the firm; you researched which competitor law firms currently do their work; and you have assigned responsibility for follow up to teams from the practice group. As we approach year-end, if your cross-selling initiatives have not panned out yet, here is an exercise to jumpstart your cross-selling strategy for 2020.

- Pick one other practice group to approach. Select one which has clients for whom your group does not provide services and a practice group which could provide services to some of your clients as well.
- Invite the practice group to a meeting to discuss cross-selling opportunities with your group. Tell the other practice group that your group will be prepared to discuss three major clients that your group serves who don't do work with the other group. Invite the other group to suggest clients of your practice group that interest them.
- Tell the other practice group that you will share the following information about your clients:
 - o The type of work your practice group does for each client and the key lawyers involved
 - o Your key relationships in each client's law department and business units
 - o The nature of each client's business which suggests a need for the other group's services
 - o Upcoming opportunities to make introductions such as occasions when the clients will be in your offices or will be attending specific events
- Ask the other practice group to be prepared to share the same information on three of their clients for whom your group does not do work. If you have specific clients of theirs in mind, suggest them to the other practice group.

You are now prepared to have a meaningful exchange of information with one other practice group.

At the meeting, the two practice groups can take turns sharing information about one client at a time. After each client presentation, the other practice group can ask questions and make recommendations about next steps to pursue cross-selling opportunities. A meeting along these lines should generate a rich set of introductions as well as a deeper understanding of the opportunities and challenges associated with each client.

Example: Two practice groups met to exchange information on cross-selling opportunities for a few key clients of each group. Each group had arranged for three client relationship partners to make a presentation on one of their clients and to answer questions. The marketing professionals assigned to each group also attended the meeting to insure continuity. The discussion yielded many concrete next steps. Each group agreed to circulate a calendar with dates their clients would be in the offices or conferences where it would be easy to introduce lawyers from the other practice group. For each client, the two groups also planned CLE on which to collaborate which would be of special interest to the client. Both practice groups also agreed to provide a list of their other clients in the same industries or other clients who had issues like each of the targeted clients. The two practice groups also agreed to meet monthly to review the status of their cross-selling initiatives.

If you haven't converted your 2019 cross-selling strategy into concrete steps, it is not too late. This exercise will help you make the progress you need before the end of the year.

Thanks to [Anne Miller](#) for the inspiration for this issue.