



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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Getting Past the Gatekeepers. Most cross-selling initiatives founder at the starting gate: the lawyers who control the client relationships. The initial process is smooth: a practice group identifies the major firm clients who do not use its services. A lawyer volunteers to pursue the client through the relationship partner whose first response is usually positive. Then things break down. When you follow up at first, the relationship partner says he will make it happen “when he can”. Later, you get no response at all. Do you give up? No way, at least not before considering the following steps:

- Evaluate whether the introduction really makes sense from the client’s standpoint. Is there another firm which has handled their work successfully for a long period? Does the client prefer to spread its work around? If you have not identified-- or helped your partner identify-- the specific client benefit, the introduction will probably never happen and maybe it shouldn’t.
- Try to get a “hand-off” from your partner, an introduction to the client that you can pursue independently without your partner in the middle.

Example: You volunteered to pursue a major manufacturing client for the environmental practice group. You have done all the things you can do unilaterally: educating your partner on the client’s environmental issues, past claims and current lawyers; and identifying the relevant decision makers at the client and how your partner might navigate from her contacts to them. If your partner is still unresponsive, it is time to ask the hard questions:

“Were you really serious when you agreed to introduce me to “X” corporation?”

“Is there anything in your relationship with the client that is holding you back from making this introduction?”

“Do you have any hesitation or fear about me or how I would handle your client?”

This process will either uncover a problem or get your partner’s attention. If she reaffirms the commitment, then persist in getting an introduction. Ask your partner’s assistant to alert you when the client will be in the office or the partner will be visiting the company. Create an introductory email for your partner to send the client that says that you will be calling them directly. And ask your partner to tell you exactly how she wants you to handle the client and keep her in the loop.

But if she waffles on making the introduction, then either give up or ask your partner the ultimate question: Is she willing to risk that that she will be displaced when environmental lawyers from another firm introduce the client to the lawyers in their firm who do the work that she does?

Are you prepared to ask your partners the hard questions which will make cross-selling a reality instead of just a wish and a prayer and a line item on a business plan?