



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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**Minimizing the Risks in Cross-Selling.** Everyone sees the potential for new work from old clients as “low-hanging fruit.” But judging from the response to my suggestion that lawyers try sharing their own clients first if they want colleagues to open doors for them, the “low-hanging fruit” in many firms consists of rotten apples, prickly pears and sour grapes.

*“My partner stole the client.”*

*“Referring a ton of work out of our office got us nothing in return.”*

*“I lost a million dollar client when my partner screwed up.”*

There are no insurance policies to protect valuable client relationships but you can adopt some basic risk management tools: Don’t just refer the client—stay involved! Be explicit up front with your colleagues about what level of communication you expect from them and make sure you get it. Your clients will be more secure--and you will strengthen your relationship with them and your colleagues-- if you bring your knowledge of their policies, procedures, and industry to this new matter. Your clients, and your colleagues, need to know that you are not abandoning the relationship when you help them engage other lawyers in your firm to handle their work.

**Example:** You have handled leasing work for the client for many years when the government starts investigating your client’s stock options practices. It is a perfect opportunity to introduce your securities and executive compensation lawyers to the client since their existing counsel’s conduct may be at issue. Given that you can’t do the new substantive work, do you hold off going after the business because you are worried that your partners will displace you or jeopardize your secure relationship? Do you take the risk that another firm will get the stock options work and do a better job at cross-selling the client on your leasing work? Or do you make clear as you mobilize a team, that you take responsibility for the client relationship, require periodic briefings from other lawyers so you can report to the client, and continue to manage the relationship? If your involvement in the add on business is an element of the work, you will be protecting the client-- and yourself.