

# Rainmaking

## Dos and Don'ts of Cross-selling: The Best Way to Grow Revenue

**SUSAN SALTONSTALL DUNCAN** | Cross-selling requires a good understanding of your clients' needs. It also requires a solid knowledge of the services and solutions your colleagues have to offer—not to mention absolute confidence in your colleagues' ability to deliver both.

The easiest and most cost-effective way to grow your firm's business is to sell additional services to existing clients—provided, that is, those clients are pleased with the services you're already providing to them. Satisfied clients are predisposed to view the firm's other lawyers favorably, and more likely to be receptive to all the other things the firm can do for them in its range of practice areas.

Who in the firm should do cross-selling? Both (1) the lawyer looking to market his or her services to other lawyers' clients, and (2) the relationship partner who wants to expand representation of a client into other firm service areas. Success will depend on just how the lawyer approaches the task.



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### Common Problems with Cross-selling Efforts

There are numerous reasons why cross-selling doesn't occur more regularly in many firms or, when it does, it often fails miserably. Here are typical problems.

■ **Lack of communication and internal knowledge.** Isolation among practice groups can impede effective cross-selling. Unless firms are vigilant about setting up key client teams or industry groups and developing integrated service strategies on a per-client basis, many of the lawyers in different practice areas may only interact on a sporadic, limited or superficial basis, such as an annual retreat. Busy lawyers often don't even take the time to brainstorm with those in their own practice groups about client needs and cross-selling opportunities.

■ **Poor internal selling.** Lawyers interested in cross-selling themselves too often go straight for "the ask" with the client relationship partner before making the case for why the partner's clients may need the lawyer's particular

services. Forging a relationship between the lawyers is the critical first step in cross-selling.

■ **The wrong selling approach with clients.** Clients grant their lawyers the courtesy of a meeting, knowing that the firm is trying to sell them additional services. The contact lawyer invites other partners to the meeting who deliver "let me tell you all about how good we are at *x* and why you need *y*" pitches. This is "me-focused," not client-focused.

■ **Lack of trust and competence.** Partners may recall clients who were made unhappy, or even lost, owing to cross-selling colleagues who were unresponsive, took too long on a matter or communicated infrequently with the client. And those still building relationships often fear that introducing another lawyer to a client might dilute their own contact with the client.

■ **Relationship hoarding.** As rainmakers with distinctive areas of expertise have become increasingly mobile, they've grown more inclined to build, control and protect portable client portfolios that can be taken to a new firm with lower risk of dispersed client loyalties. On the other side of this, partners who had been willing to cross-sell but have been burned by someone leaving with their client often are reluctant to make additional introductions.

■ **Lack of strategy.** To effectively cross-sell a client, a lawyer must constantly

be on the alert for opportunities to expand representation. But clients complain frequently that their lawyers don't spend enough time strategizing with them about future hurdles and opportunities.

■ **Insufficient client awareness.** Many clients admit to being unaware of their law firms' experience in areas outside of the services they're currently receiving. While clients may receive newsletters and other communications from the firm, they often say their own lawyers have not made the connections or personal introductions to lawyers who may have the expertise to meet their other needs.

■ **Client-specific selection practices.** Many companies now select firms on the basis of a particular area of expertise or a specific lawyer's reputation in a field. However, while client needs and markets are specialized, purchasing decisions are often decentralized. Thus, not understanding who the decision makers are or how to bridge to the right people can impede success.

#### Tips for Cross-selling Successfully

Avoiding these problems is largely a matter of cultivating good communication with clients and within the firm. Here are pointers on maintaining familiarity with client needs and maximizing cross-selling opportunities.

■ **Listen to clients.** Whenever you talk to them, always ask questions about how their business is doing, new executive hires or shake-ups, industry trends and threats from competitors. Also regularly ask for feedback on your service and the service of others now working for the client.

■ **Know your firm's range of services.** Keep skills, case and transaction inven-

tories. Spend time on the firm's Web site to get up to date on all its practice niches and specialties, relevant industries and markets, and office and lawyer strengths.

■ **Develop client teams and industry groups.** Cross-selling happens more often when lawyers from various service areas regularly get together to review specific client opportunities and industry trends. Even if your firm is collaborative, frequent full-firm meetings are crucial to ongoing cross-selling success.

■ **Communicate with clients about areas of interest.** Remind them of all the firm's areas of expertise, specific results and "wins," and alert them to areas of concern or change. If others in the firm author articles relevant to this client, send those along with a personal note. Whenever you identify a possible or future client need that others in your firm can help with, make time to follow up with the relevant colleagues about addressing it.

■ **Sell yourself to your own colleagues.** If you are trying to promote your services to others so that they can sell you or introduce you to clients, make the case for why you add value and how you will enhance the relationship with that client. Make your value proposition easy to understand. If you receive a referral to help someone else with a client matter, provide superlative service and quality and check back with your colleague to make sure the client was happy.

■ **Make it a team endeavor.** It is much easier to sell others than to sell yourself, but it is even easier to sell them if they are with you in person. Don't try to do all the selling yourself. Let your colleagues participate in the process of identifying as well as addressing addi-

tional client needs. Place the focus appropriately on service and responding to client needs, not on selling and promoting either your colleagues or yourself. It is about *the client*, not about you.

■ **Share credit and reward cross-selling.** Updates about cross-selling successes can be incorporated into the firm's internal newsletter, an addendum to new matter openings and at attorney meetings. Because cross-selling clients requires a team approach, acknowledge and reward those who follow team and client-centric behavior. Celebrate cross-selling successes—nothing motivates behavior as much as tangible reward.

■ **Make sure you really offer value when you cross-sell.** Not every client will need what your colleagues have to offer and there may be many other firms or lawyers that can better serve them in certain areas. Often, it can be difficult to displace another lawyer or firm, even if the client is not fully satisfied. In any event, don't oversell yourself or the firm. However, if the client truly needs something that you or a colleague is superbly qualified to provide, proceed enthusiastically.

#### It's All About Identifying Solutions

Cross-selling to existing clients is similar to selling to prospective clients. You have to understand their business, identify their needs and issues, and discover where opportunities might exist for you. When you engage in discussions about providing solutions to current or anticipated problems, you must talk to the decision maker to ensure that your services are effective. Above all, remember that every success you provide to a client should serve as a steppingstone to further cross-selling opportunities. LP