

# Marketing

SALLY J. SCHMIDT ■ SOLUTIONS YOU CAN USE

## Four Steps to Taking Control of Cross-Selling

Cross-selling, or cross-marketing, is a popular topic in law firms. Most firms believe that there are opportunities to expand the amount of business they receive from existing clients. And everyone knows that existing clients are the best sources of new business. Still, cross-selling is a little like the weather—everyone talks about it but nobody does anything about it.

I believe that most lawyers don't understand how to cross-sell. They look to "the firm" to introduce other services or offices to clients, through institutional programs such as seminars, newsletters or e-mail announcements. Yet to be effective, cross-selling needs to be done one client at a time.

It involves a simple four-step process, outlined in the following sections. Also included are relevant comments gleaned from client interviews, to help drive home the point of why each step is so important.

### One: Understanding Needs

*"Someone should have taken the initiative to say, 'I know you'll have these problems; let's meet.'"*



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The first, and most important, step in effective cross-selling is to understand the client's needs. You can't cross-market a service the client doesn't require. Discovering needs requires doing your homework and being a good listener.

Start by learning as much as you can about the client's business (such as number of subsidiaries), legal situation (such as presence of in-house counsel), key players (including decision makers for various areas) and relationships with the firm (including the nature of the contacts). Just as important are any "emotional" factors the client might face in moving additional business to your firm, such as:

- **Risks.** If the client's securities work is being handled by a "name brand" firm in New York, for example, you'll need to convince the general counsel that you are a good risk for taking on this kind of work.

- **Objections.** Perhaps the client had a bad experience with a litigator at your firm. Then you'll need to explain why that won't be a factor in future matters.

You can obtain client information in many ways, such as polling your colleagues; searching the Internet; talking with other client advisors; and reading available client information, found in annual reports, on Web sites and so forth. The most important source of information in identifying needs, however, is the client. You should schedule time with the targeted client to ask informed questions that will help you spot opportunities.

### Two: Knowing the Firm's Capabilities

*"The client really needs to know a rundown of services offered."*

Learning a client's needs is half of the equation; the other half is being able to speak to the firm's ability to handle the work. Most lawyers tend to spend the majority of their time with a relatively small number of co-workers. But the most successful cross-sellers (and developers of business generally) make it their business to know as much as possible about their law firms and their colleagues. To become familiar with your firm's "product":

- Visit the firm's Web site and intranet on a regular basis.
- Read your colleagues' bios and learn what their areas of expertise are.
- Review all firm materials that cross your desk, such as practice group newsletters, colleagues' articles and seminar invitations.
- Treat your colleagues like targets. Visit related practice group meetings to understand their clients and results, and use lunches or firm meetings to interact with people you don't usually meet up with otherwise.

### Three: Presenting the Information

*"I don't know anything beyond litigation there. I know they have a significant number of people, but I have never met them."*

Once you have identified the client's need and your firm's ability to fill it,

you are ready to present your case to the client. Believe it or not, most clients will welcome your efforts to let them know more about your firm's services. Keep in mind, however, that you need to focus on specific areas where you have determined the client has needs and feel the firm could be of assistance.

The best way to do this is through face-to-face discussions (although some opportunities may be pursued by phone or through written proposals). It may be as simple as drawing a new practitioner into the client relationship. For example, "I've asked Tom, one of our tax lawyers, to sit in on this meeting, at no charge to you. We find that having our tax lawyers involved early can help avoid problems in the long run."

If you are meeting with a client to introduce new services, keep the following in mind:

- Bring the right people to the meeting. If you want to introduce a client to your firm's products liability area, you ought to bring a litigator from that department.

- Show, don't tell. The best way to minimize a client's perception of the risk of hiring you in a new area is to demonstrate your good track record in that area. Bring a list of client references, results or transactions.

- Directly ask for reactions, or a chance to do the work.

#### Four: Following Up

*"They do a poor job of laying out the services they provide."*

You may strike gold and walk away from a cross-selling meeting with a new file. In many cases, however, even if the client expresses interest, there may not be an immediate need. That is why your follow-up efforts are so important. Consider these to-dos:

- Put the client on the appropriate mailing lists for receiving newsletters, seminar notices and substantive alerts in the new areas.

- Send articles of interest and personal notes, both from the initial lawyer contact and from the colleague being "cross-sold."

- Send firm marketing materials specific to targeted areas.

- Continue face-to-face contact through entertainment, working lunches or meetings, firm events and seminars, or visits to the client.

#### It Doesn't Stop There

Many other activities will support your cross-selling efforts. Among them, think about implementing these ideas:

- Talk positively and continuously about others in the firm. A client shouldn't learn for the first time that you have an employee benefits practice on the very day you are trying to cross-sell it.

- Be proactive in introducing a "team." Put people on a client team in anticipation of the need.

- Get clients involved in your firm. The more a client feels invested in the firm, the broader the use of the firm tends to be.

Finally, remember that cross-selling is about selling people, not services. Success usually comes when clients become familiar—and comfortable—with other people in your firm who can fill the clients' needs. LP