

Play to Win

Cross-Selling Made Simple

By [Sally J. Schmidt](#) | Feb.24.16 | [Business Development](#), [Daily Dispatch](#), [Legal Marketing](#), [Play to Win](#)



Recently I was contacted by someone looking for good articles on cross-selling. I noticed that a lot of material discussed the obstacles — compensation systems, internal competition, lack of confidence in colleagues, lack of knowledge about firm capabilities — but few addressed how to do it effectively.

Whether you call it cross-selling, client proliferation, cross-servicing or something else, it basically means obtaining a greater share of the client. There are different ways to do this. For example:

- Getting more of the same, such as a larger share of the company's products' liability work.
- Expanding within a particular practice area. Maybe you are handling a private equity company's portfolio company work but would like to help with fund formation.
- Expanding geographically. Your firm may be handling employment litigation for a company in one state but would like to handle those matters in other firm locations, too.
- Working in new substantive areas for a client. If you are getting a company's corporate matters, you might want to get its tax work as well.

Steps to Cross-Selling

In my experience, successful cross-selling involves four steps.

1. Understanding the client's needs and influence. First, you need to identify client entities that may have opportunities for substantive or geographic expansion. Then you need to determine whether your client contacts are decision makers or influencers in the new area(s). If not, you will need to rely on your contacts to make introductions to others in the company who probably do not have a track record with you and likely have other lawyer relationships.

Many times, lawyers are not realistic about their perceived opportunities. Like law firms, many companies work in "silos." Just because you handle real estate closings for a bank doesn't mean those loan officers have any influence over the people in the workout area. Likewise, P&C insurance claims people may have little to no contact with the folks handling D&O coverage matters.

2. Understanding and having confidence in your firm's capabilities. I once worked for the best cross-seller I have ever met. One key to his success was that he knew everything about everyone in his firm — political affiliations, spouses' jobs, colleges attended. He understood that client relationships are all about connections and that you never know when someone else's connections will come in handy.

In addition to knowing about your colleagues, though, you need to be enthusiastic about them. Let's say a client asks whether your firm can help with cybersecurity issues. Some lawyers respond with something like, "I don't know; I'm sure we do." Or, "I'll check and get back to you." Now compare that to these responses: "Do I! My partner Diana is fabulous; clients sing her praises." Or, "My colleague Joe wrote the book on privacy law."

3. Approaching the client. Once you have determined the client has a need that your firm can fill, you must introduce the client to the capability. Don't be afraid to approach clients; if they like you and are happy with your work, they will be delighted to sponsor you within the organization.

Keep in mind that cross-selling is not about selling services, however. It's about selling people. Clients will need to meet and gain confidence in the people who will be delivering the new services to their company. Face-to-face meetings or substantive programs can be great ways to get the new people in front of the client representatives.

Getting work may be a two-step process. For example, you may need to get on a list of panel counsel before you can start getting files. Or you may need to wait for the next RFP cycle so you can submit a formal proposal for consideration.

4. Following up. Finally, successful cross-selling requires follow-up. What are the odds that a particular client will have a specific piece of work at the very time you're talking about it? There must be a sustained effort to follow up with client contacts about the area in which you are seeking work. The person who will handle the new work should be encouraged to make direct contact with the client. This could range from forwarding articles or other substantive information to sending invitations to seminars, webinars or podcasts, to extending invitations for social contact to build the relationship.

Keys to Successful Cross-Selling

Following are some additional thoughts that might improve your cross-selling in the future:

- **It's never too early to start building an internal team.** Identify the go-to people in your firm's practice areas or offices that your clients may require. For example, if you are a business lawyer who works with middle-market companies, you should find a litigator who understands the cost sensitivities of these clients.
- **Identify collaborators.** Cross-selling is a lot more fun and generally more successful if you work as a team. Identify your respective contacts and then team up to approach people or entities you have in common. Include each other in things like social events or formal pitches.
- **Stay up to date on colleagues' activities.** Read their articles. Note their activities. See what speaking engagements they have lined up. The more you know about your "product," the more likely you will be to spot and respond to opportunities.
- **If your aim is to be cross-sold, reverse engineer these steps.** Identify opportunities for your colleagues to expand their client relationships, give your colleagues information on your capabilities and activities, and offer to provide value-added information to their clients.

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