

## Making cross selling happen in practice

By Linda Julian

One great divide between law firms today is effectiveness in cross-selling. So, what is meant by "cross-selling"?

Cross-selling is the process of converting the client of one partner or department to the satisfied user of a wide range of the firm's services delivered by multiple partners in various fields of practice.

Why is it important? Ultimately, cross-selling yields happier relationships with satisfied clients. It should be a core activity in your marketing plan: cross-selling accomplishes the fundamental objectives of retaining and developing established clients.

Successful cross-selling gives the practice opportunities to work as a multi-disciplinary team, deliver integrated and timely services, and save the client money.

When embarking on cross-selling exercises, most lawyers start with what's in it for them. They quickly list the advantages: increased revenues for the practice, growth and prosperity for their firm, taking the competitors down a notch, and all the kudos that goes with "making rain". Success rarely results. Most cross-selling efforts fail, and lots of lawyers carry scars to prove it.

Make no mistake: while cross-selling has plenty of advantages for the lawyer and his/her firm, don't expect clients to respond to these.

Successful cross-selling starts with the client. It forces close attention to client needs, client business, and client satisfaction.

A cross-selling campaign will cause you to focus on your client more closely - you must show that you know and understand their priorities.

Think hard about a client with development potential - one for whom you're providing only a narrow range of services right now.

- Do you have the prerequisite knowledge of their business, industry, and key personnel?
- Do you understand their legal needs and requirements for specific advice?
- Does your client recognise these needs?
- Are you positioned to provide these services? Does your intimate knowledge of the client position you uniquely?
- Will the client benefit from increased convenience, integration, and economies if your firm provides these services?

So, how can you get the process underway? It's the partner with a strong and established relationship who's best placed to cross-sell. He/she already has high credibility with the client, is trusted and respected, and has the vital knowledge. This person can initiate effective cross-selling.

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Look for areas where you can deliver distinct advantage to the client: don't think first about the services you want to promote. Rather, base cross-selling activities around what a client wants and needs and work out where you can provide a genuine benefit.

Meet with colleagues to share intelligence about specific clients, identify opportunities to extend services, and plan campaigns. The best cross-selling will happen somewhat organically - it will be the "natural" outcome of diligent service and sincere client focus.

Invest in some business development skills training. Get comfortable with introducing new services and colleagues.

A single technique won't work with all clients: tailor individual approaches for each. Be patient. (In research with key law firm clients, I constantly hear about distinctly unobvious efforts to cross-sell and their counter-productive outcomes.)

Beware of internal obstacles which can bring great intentions undone. Do your partners revel in the exclusivity of their relationships with clients - variously called "client-hugging" or "client-hogging" ? Persuade them of the benefits to the client, and to themselves, if you want cross-selling to produce results.

Barriers include systems which recognise or reward partners for generating their own fees, rather than delivering revenue opportunities to other areas of the firm.

If you want cross-selling to become an integral feature your marketing, remove impediments by ensuring credit for everyone involved in developing, servicing, and producing work for the client.

In an increasingly crowded market, cross-selling will help you keep competitors at bay. After all, a client who's busy trying new services from your firm probably won't be so susceptible to overtures from others. Your lawyers will be happier as their practices and opportunities to specialise grow.

A client who buys new services from you offers tangible evidence of the value they place on the connection. I guarantee it's worth the effort to implement an effective cross-selling programme and make it happen in your practice.

#### **About the author**

Linda Julian is acknowledged as a leading authority on strategic practice development and how to win business for law firms. Since 1979, she has consulted with lawyers and other professionals throughout Australia, New Zealand, the Pacific, and Asia on a wide range of business acquisition, client retention, and strategic management issues.

Her book *The Passionate Professional: creating value, success, and prosperity* has sold in 13 countries and has received wide acclaim. Linda lectures in strategic management and marketing professional services at post-graduate level. She leads the small and highly specialised Julian Midwinter & Associates consulting practice.

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