

Cross-Sell Effectively by Putting Client Needs before Your Own

Aug 14 Posted by [Susan Saltonstall Duncan](#) in [Business development](#)



Cross-selling is a good concept, assuming that clients love the work you are doing for them and are thrilled with the level of competence and service (and you know this because you have formally and regularly solicited your clients' feedback). As discussed in a previous post [Strategic Account Management Must Be About Client Value First, Not Sales](#), your focus must first be on ensuring that your clients are extremely satisfied, you are responding to their needs and you are creating value for them.

If you do have a highly satisfied client, expanding your representation of that client should benefit both you and the client. It is usually obvious why firm's receive value from cross-selling:

- It costs considerably less in business development time and dollars to get more work from an existing client than to land a new client.
- Getting more lawyers involved in the relationship makes the client more loyal to the firm (and less likely to jump ship if a partner leaves).
- Working on multiple matters for a client makes it easier to smooth rough edges if something minor goes wrong.
- The cost of switching firms becomes a greater deterrent for the client.

For the client, expanding services to clients can also help them:

- It often is more efficient for the client to work with others in the firm since you already know their expectations and protocols (although these should be revisited with every new matter).
- You may already share software and billing technologies.
- They know that giving you a bigger piece of the pie might qualify them for fee discount and value-added services.
- They become a more important client for you.

Cross-selling, however, should really be called cross-servicing because cross-selling implies, and too often aptly describes, what many lawyers do: try to sell their clients a new service that they may not want or need. As you should when trying to attract any new client to the firm, cross-selling should be done only after assessing the needs of the client, finding out how those needs are currently being met, and identifying potential opportunities where you might find a fit between the client's needs and the services or expertise someone else in the firm can offer the client to satisfy this need.

On the other hand, surveys of clients show that it is common for clients to be aware of only 30% of the services a firm has to offer. Clients regularly refer work to other lawyers or firms because they do not know that you or your firm provides this service. But it is also true that clients will often refer work out to several lawyers or firms either due to personal friendships and loyalties, an area of expertise, in an effort to reciprocate and spread work around or as is more frequent these days, to get a better price.

Some steps you can take to improve your cross-selling efforts:

- Stay focused on what is best for the client: look for actual needs they have and explore with them how those needs are being met by others. don't assume you are the best or only solution. Remember that clients usually do not want to displace current counsel.
- Proactively look for opportunities to cross-sell, but do your homework first. Identify clients in the firm that are in industries or are of a type likely to need your area of expertise.
- Look at the firm's largest clients and analyze by practice area where fees have been billed over the past three years. Look for up and down trends and voids.
- Conduct research on possible targets. Find out who they use now for various legal services.
- Talk to and listen to your clients. Ask a lot of questions that will help you better understand their business, industry trends, new offices or acquisitions, major initiatives or challenges, competitive and financial pressures, etc.
- Know what areas of specific expertise your colleagues have and find out how their services could benefit your client. Identify the firm's strengths and areas of distinctive expertise.
- Be prepared to sell a discrete "product" or service, e.g., an assessment or audit, that will allow you to get your foot in the door but not force the client to fire an existing law firm.
- Provide partners in the firm with snapshots of other practice niches and services that clients might need to make it easier for them to discuss additional service needs.
- Determine what lawyers in other firms are currently providing services to your client. Find out how satisfied the client is with these firms and how solid the relationships are. Ask how they select law firms in the different areas you have to offer.
- Identify those lawyers in the firm with whom you have a built-in reason to cross-sell and/or a personal desire to cross-sell.
- Make a point, at least once a year, to visit other offices in the firm to have meetings with specific partners, attend other practice group meetings and walk the hallways.
- Ask colleagues who have referred their clients to you how their clients have felt about your services – no one will refer you more work if the work they referred was not handled well.
- For those clients you and your colleagues, after careful research, have identified as potential cross-sell targets, devise an action plan to meet with each target client, explore needs and opportunities, and follow-up with introductions and requested information.
- Create or join a client team or industry group. These are the two frameworks in firms that naturally facilitate cross-selling and cross-servicing.

Tags: [Client Service](#), [Client Value](#), [Cross-Selling](#), [Key Client Teams](#), [Needs Assessment](#), [Service and value](#)

- [PRINT](#)