

## Cross-“Helping” Tactics That Pay Big Dividends

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Just as everybody wants to go to Heaven, but nobody wants to die, we all espouse cross-selling as the surest and quickest route to increased firm profitability, and yet we struggle to accomplish it. More elegantly put, cross selling is more honored in the breach than in the acceptance. How then, do we as professional marketers and business developers help our firms practice what we preach? What really works?

### “Give to Get,” or Other Variations on the Golden Rule

A prominent partner at a well-known firm once said, “I wish just once someone would ask me to help *their* client rather than always asking to be included in helping my clients.” And so it goes. In many firms, clients are still viewed as components of individual partners’ portfolios rather than as firm clients. If that is the case, and Partner A would like to be brought in on a matter for Partner B’s client, her best approach is to see whether there is an opportunity to bring Partner B in on a matter for one of her (Partner A’s client’s) matters. Partner B can then experience how well the two of them work together, and with rapport and trust established, the table is set for his bringing Partner A in on a matter for one of Partner B’s clients in a similar way.

Too often, the approach is instead as follows. The litigation group decides that the corporate group isn’t cross-selling litigation services sufficiently, so the litigators asked to attend a corporate practice group meeting to give a presentation to their fellow partners on the strengths of the litigation practice. Too often, they do so without first analyzing the corporate group’s client base and coming up with suggestions for where and how they, the litigators, might help. Their approach is “here’s what we’ve got to sell—now buy it!” Competitive intelligence about the client base is a first and required step in improving this common scenario.

When partners or practice groups meet jointly, a good approach to take is to “ask, don’t tell.” In other words, ask about the “buying” partner or group’s clients and their problems rather than launching in to a recitation of the “seller’s” practice and history.

### First Seek to Understand, Then to be Understood

How can a partner or a firm offer a solution to a problem that is not fully understood? As one of the presenters observed at the recent and superb Competitive Intelligence Summit sponsored by Martindale-Hubbell and LMA, “first, do no harm.” We are in danger of harming our relationships with our clients when we propose solutions out of any context whatsoever. The CI Summit offered a plethora of tools and suggestions for improving our understanding of individual clients and prospects, of our client bases, of our competitors, and so on. Some basic questions to ask and answer are, for example:

- What is this client’s line of business and industry?

- What other clients do we represent in this industry?
- What are some of the problems and opportunities our clients in the industry and the industry at large are facing?
- What do our competitors offer to clients in this industry with these problems?
- What is our competitive advantage?
- What have we done to help other similar clients?
- Are those prior solutions applicable in this instance?
- Does this client know they are facing this problem or challenge?
- If not, how will proposing a solution be helpful?

These are merely some of the rudimentary questions to be thought through before engaging a fellow partner or group in a discussion of “how I can help.” And who better to help with these questions and answers than the professional marketing and business development staff?

Other ways for staff to help include creating an expertise database—who in the firm has experience with which types of matters. Start with Martindale-Hubbell’s standardized practice area descriptions and customize them for your firm. Have each attorney indicate where he or she has some experience, and where he or she has a core strength. Code all new matters similarly. Create a deals and suits database. Identify (code) all clients by industry. Create a matrix which shows key clients in descending order, and the areas of practice currently used by those clients. When these data are at hand, it is much easier to cross help or cross sell, since the tools for doing so are then available. Without these types of information, we are just guessing.

## Focus

Just as firms often target clients for expansion or prospects for acquisition, individuals and groups within the firm might narrow their focus, at least in the short run, rather than trying to “cross-sell” with and to every other partner or group in the firm. In other words, buddy up. Pick the partner or group where the most opportunity exists for helping prospects or clients through a collaborative approach, and then stick with that group. Rather than having litigators make a presentation this month to the corporate group and next month to the intellectual property group, litigators and corporate partners might agree to meet jointly for several months in a row, to establish close bonds and deep understanding of their mutual strengths and opportunities and understand their clients and prospects in common. This approach is more likely to be fertile than a one-off method.

Another way to focus is to create teams, virtual and fluid or otherwise, for key clients and prospects. Many partners are more willing to use a team approach in the pursuit of business from a new client than in pursuing new business from a current client. A firm’s compensation system will often provide insights into this phenomenon. But, it is what it is, so start where you are. If teams work in pursuing new clients, then use teams in that way until the environment changes. Gather a likely group and collaborate on how business can be gained, after each team or group member has reviewed competitive intelligence on the prospect and has familiarized himself or herself with the

firm's strengths and past experiences that are on point. Each person will have a different perspective and history, and, as the saying goes, "none of us is as smart as all of us." Focus the mind of the group on the prospect at hand and see what develops.

Remember, Partners are the First Buyers in the Cross-Selling Process

In any buyer's mind, there are always at least three questions:

- So what?
- How can you prove that?
- What's in it for me?

When partners are offering their help to other partners, they are in essence selling their services to them. And the buying partner or group of partners is skeptical, just as clients often are. Further, they are painfully busy. It is important, then, for the selling partners to anticipate the three key questions and to answer them—even making reference to them by saying things like, "You may be saying to yourself—So What? Well, here's why this is important for your client..." Drawing out the inference of how this helps the partner whose client is about to be served is also a smart thing to do. The selling partner must inhabit the mind of the buying partner. Professional marketing and business development staff can help partners think through these questions by posing them in advance, in planning and strategy sessions, before the partner-to-partner meetings occur.

Who Are You Anyway?

Cross-selling languishes for a number of reasons, but key among them are lack of trust (I don't trust you not to show me up and take the client from me...I don't trust you not to ruin my hard-won relationship with this client) and lack of information (who are you and what do you want from me...how would I know what my client needs). Competitive intelligence helps us understand what our clients need and want and what we in fact have to offer. Working together helps us build trust and relationships. And marketers and business developers are in the best possible position to help on both counts.