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DEVELOPING REVENUE-FOCUSED LEADERS
LEADERSHIP · BUSINESS DEVELOPMENT · RETREATS

February 2007 Client Development Tip of the Month

Cross-Selling:
Educate Complementary Practice Groups and Attorneys

Things To Do

- ☐ Target practice groups and individual lawyers who can be good sources of referral business for you
- ☐ Interview key lawyers to learn what topics would serve their clients
- ☐ Prepare a "cheat sheet" of questions they can ask their clients on your behalf
- ☐ Conduct a training session for a group, or have an educational meeting with an individual lawyer

Measures

- How many educational sessions can you schedule this month?
  - » Give yourself one point for conducting the session

Extra credit:

- » One extra point if hand out a "cheat sheet"
- » One extra point if you ask the group/individual lawyer for names of clients that might need your help
- » Two extra points if you get another lawyer to arrange a meeting with, or a presentation to, one of their clients

Educational Meetings

(Print and fill in the boxes to create your personal scorecard)

Attorney/Group	Education/ session conducted	Hand-out "cheat sheet"	Potential clients identified	Get meeting or give presentation to their client	Total