

Mastering Cross-Selling

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In a recent Altman Weil survey of 81 Managing Partners at firms with 50 more lawyers, 74.4% of the firms were determined to be “Poor” at effectively cross-selling. Additional survey data uncovered three major factors for improving cross-selling performance:

- 1) Providing training for Practice Group Leaders.
- 2) Getting Practice Group Leaders to spend over 250 hours per year on group leadership.
- 3) Engaging in a formal practice group planning process.

The following is a checklist of specific actions that can help your firm excel in each of these areas:

- 1) **Providing training for Practice Group Leaders** – key areas include:
 - Show lawyers how to overcome the common obstacles to cross-selling.
 - Develop the right goals and measures.
 - Create and manage to a cross-selling checklist.
 - Create a task force to track, report, and encourage ongoing progress.
 - Teach leaders how to become effective internal business development coaches.
 - Encourage communication and relationship-building inside the firm.
 - Consider leadership coaching to support ongoing implementation.
- 2) **Getting Practice Group Leaders to spend over 250 hours per year on group leadership**
 - Develop a clear set of roles and responsibilities, especially relating to leading cross-selling efforts.
 - Track and reward time spent executing leadership responsibilities.
 - Provide financial and personnel support to allow leaders to focus on the highest and best use of their time.
 - Encourage complementary Group Leaders to meet with each other to plan cross-selling between their groups.
- 3) **Engaging in a formal practice group planning process**
 - Get support from outside experts, and/or facilitate planning through a task force or with all group members.
 - If developed externally, solicit feedback from group members to encourage buy-in.
 - Get as specific as possible by drilling down to strategies, goals, measures, and action steps.
 - Assign accountability and agree to definite deadlines for completion of tasks.
 - Provide regular reminders, measure ongoing progress, and make implementation a high priority throughout the year.
 - Align compensation with completion of specific tasks.

Mastering the art and science of cross-selling should be high on any leader’s priority list. Done right, it creates positive ripples throughout a firm, requiring superior performance in areas like client service, teaming, internal and external communication, and accountability. Firms that learn how to align these stars will be rewarded with greater client loyalty and increased revenue.

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