

DAILY REPORT

AT ISSUE

Law firms, in general, are notorious for poor marketing practices. ... But let's be clear. You can't cross-sell by bullying your partners to introduce you to their clients.



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Cross-selling about wooing

ONLY WHEN COLLEAGUES are on the same page does selling the client become easier to do

A LAWYER TOLD me the following cross-selling story. If it weren't so pathetic, it would be comical. A couple of years ago, this lawyer's small firm was acquired by a large corporate firm. A few months after the acquisition, this lawyer was called into a conference room.

"There were three of my new partners in there, and they asked me to sit down," he recalled. "I had no idea why I had been called in."

"We want to know who your clients are," one of the waiting partners demanded. "We want to learn which ones you think we could do corporate work for."

The lawyer was flustered and did his best to describe his relatively small book of business. After about an hour of being interrogated by his new partners, he was sent away. "I don't think a single piece of business developed as a result of what happened," he told me. "I had no idea what type of work these partners did. I have to admit I still don't."

Law firms, in general, are notorious for poor marketing practices. But this is one of the most flagrant examples of business development cluelessness I have ever heard of. Hopefully it's an anomaly. But let's be clear. You can't cross-sell by bullying your partners to introduce you to their clients.

Use a two-step approach to cross-sell

The best cross-sellers use a two-step approach. Step one is to woo—not intimidate—the partner that you hope will introduce you to his or her client. Then you go together to meet the client and discuss their legal needs.

Here's what one big firm IP lawyer does. Every year he creates a business plan that targets a dozen or so prospective clients from his firm's client list. He picks firm clients that he suspects may have unmet intellectual property law needs.

But this intellectual property partner

doesn't then grill his partners on how they can get him business. Rather, he sets an appointment to meet with his partners to discuss how he can add value to their practice by helping their clients with possible intellectual property issues.

In other words, this intellectual property lawyer woos his own partners. "We talk about how I can plug into my partner's practice," he told me.

The two partners then go together to meet with the client to discuss the business's intellectual property needs. "My partners open the door, but I have to close the sale," he said.

When your own partners are no help

What if the partner won't open the door?

Indeed, often lawyers don't trust their own partners enough to permit cross-selling attempts. That's understandable considering the size of today's large firms. I was working with a partner earlier this fall who told me that when he saw the list of the highest-paid partners in his firm, there were several names of lawyers whom he had never met.

But not knowing your partners is no excuse. The best cross-sellers develop relationships with their partners. The IP lawyer I discussed above takes annual trips to all of his firm's offices, meeting with partners and discussing his IP practice. The goal is to get to know his partners so that they will be more willing to allow their clients to be cross-sold.

Of course, some lawyers won't ever let another partner in on a client relationship. Some lawyers are micromanagers. Others are small-minded jerks. The best practice in such situations is to move on. Find generous partners that want to grow their client relationships. In sales, we call that "focusing on the best prospects."

If you want to cross-sell, you can't expect your partners to do it for you. You have to woo your partners first. Then you have to go together to meet with their clients. **DR**