

## Cross-Sell Yourself To Existing Clients

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Cross-selling, like cross-dressing, is a tricky business. Style matters first; ultimately so does substance, but not at first blush. Asking for new business from an existing client -- cross-selling new services -- is one of the most profitable ways to gain new revenues because it is easy on profit margins; it takes little time, the client is a known quantity, so you know how to work with him or her, and your reputation precedes you.

Many firms recognize that litigators, especially, are not successful cross-sellers of transactional services, because they have been trained in the school of "Never ask a question to which you do not know the answer." Transactional lawyers, too, often struggle with cross-selling because they forget to mention all that they or their partners do. The cross-selling hunt, however, turns on asking the right open questions in specific ways to pave the way toward a larger working relationship. Specifically, the more surprising the answer, the greater its rainmaking value.

Surprises are not always anathema. Compare the answers gained from these two questions posed during a client interview; the attorney is trying to cross-sell mediation services to a litigation client:

### Scenario One:

**Lawyer:** *"Do you realize we handle matters in mediation and arbitration as well as litigation?"*

**Client:** *"Yes."*

*Uncomfortable silence ensues.*

### Scenario Two:

**Lawyer:** *"John, tell me what your goals are for managing litigation expenses this year. I have some thoughts, but I'd like to hear yours first."*

**Client:** *"Kill all the lawyers and really decrease expenses ... just kidding ... but I have given some serious time to investigating mediation, and Zippity Law Firm has given us a presentation and proposal for mediation services."*

*Slightly pink-faced surprise ensues, followed by breathing and then sophisticated thought processes, to wit, Who is Zippity? Who the heck is Zippity?*

**Lawyer:** *"Excellent. Mediation is one part of my thinking. In working with a number of clients on litigation expense management, we have formed a mediation practice group. I'd like you to meet my team so we can talk about specific strategies you could implement. Benefits include not just better expense management but also improved cash flow. What dates do you have open next month for a meeting?"*

## HOW TO ASK: WHY LISTEN?

People pay attention when your remarks highlight why they should listen. By framing your discussion and questions around the listener's interests, you answer this implicit question.

While there is usually one ultimate decision maker in each client account, there are others who must be included in the decision process for political and operational reasons. Start with the real decision maker. Lay the groundwork to asking for an appointment or meeting by painting a picture, a scenario really, that demonstrates the problem or issue you want to discuss in light of his or her self-interest. Two approaches help the listener listen:

Historical perspective: "Ms. Client, you had a high number of X matters last year. I want to talk with you about some alternatives ... ."

Tell a story: "Mr. Client, the issue of Y is one that is a long-term business problem, and in working on this issue over the last six months, we have found that you have some alternatives I would like to discuss ... ."

State that the questions do not ask for answers for a moment and answer and ask the client to

Note that the questions do not ask for a yes/no or closed-end response, and so the door to discussion is left open. When you use a historical or story-based opener, the client does not feel singled out by what may appear to be your financial self-interest; the client has a context (other people and past events) to reconsider the issue you broach that is helpful. And you have answered the question, "Why listen to me?"

#### **WHAT'S IN IT FOR ME?**

The next step is to get the client to take action -- meet with your colleagues, for instance. Besides the saintly, few people take action for selfless reasons, so when you ask clients to take action, they will only if you demonstrate how it serves them by answering the question, "What's in it for me?" Don't make up the answer; base your suggestion on what you know or what clients have told or shown you about their *raison d'être* in life and work, such as:

"Ms. Client, you had a high number of *X* matters last year. I want to talk to you about some alternatives ... that will help you enhance margins/support your reputation as a leader/put you in the driver's seat on this issue, etc. ..."

If you have framed the issue correctly and addressed self-interest, the next and final step is to motivate action. You must answer one last question, which is, "Why decide now?"

With the exception of death and taxes, sloth prevails against taking action and making decisions. If you give your client a reason to move and also save face if he or she delays, you support the long-term relationship:

"We have some time the first of next month to meet with you. You may not want to move that quickly, but at least you'll have the information ... ."

#### **NOTES TO SELF**

Almost without fail, both litigators and transactional lawyers will say that they have lots of contacts, while at the same time lamenting they haven't been able to convert them into multiple-service, long-term clients. When you meet people through matters or at events, make a note to reconnect. Put contacts in your computer's task reminder on a recurring schedule. You should have 30-, 60- and 90-day contacts.

Note what the contact or client does and any other interests he or she may have, so you have a basis for asking to get together. Update your notes. The more people you know well, the more clients you will ultimately have.

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