

How to Get Clients to Use More of Your Services

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Cross selling is something that's always sought by law firms but very rarely achieved, and data bears that out. About four percent of law firms say that they are effective at cross selling, and three quarters rate themselves as ineffective, which is really too bad, because cross selling is the easiest way to increase your business.



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Data shows that it requires eleven times as much money and resources to bring in a new client as opposed to opening a new file. An additional problem most law firm face is that law firm partners are hoarding their work, especially in this economy, rather than handing it off to others. These people are basically lone wolves.

Some basic assumptions that you need to have in place for cross selling to work at your firm include:

- **Realize how much money you're leaving on the table by not cross selling your clients.** If you're serving them in one area, you could almost double your revenue if you fully cross sold your top clients. By "top client" I mean clients that already generate 80% of the firm's revenue.
- **A client is an asset that belongs to the firm** – an asset that anybody at the firm can maximize. You're going to have trouble with cross selling if people persist in thinking that a client is a partner's portable book of business, that they own the client, and they can prevent anybody else from getting involved. That's totally the wrong attitude.
- **Cross selling is not dragging a partner along to a meeting with a client.** When you produce your tax partner and say, "Hello Mr. Client, do you have any tax work to give to my partner?" -- that's completely the wrong way to go about it, although I've seen many law firms do it.
- **The key to making cross selling work is finding out what the legal needs of the client.** In my opinion, it is the job of the relationship partner or the billing partner, as they're sometimes called, to inquire about what those needs are.
- **Many times lawyers erroneously see cross selling as basically cross promotion**, where you go to a client and talk about your law firm and why they need your particular practice groups. The better approach is to think about cross selling *interviewing* them, so you gain an understanding the client's business in such depth that they're tell you all the new areas of service that they need.

Start to think of yourself as a business doctor: cross selling is being intelligent and

asking a set of kind of broader business questions, and listening to the clients' responses, and then asking a set of more specific diagnostic questions. Cross selling can be as easy as getting your partners to identify the people at the client who have a potential need for your services, and preparing a simple list of questions you can ask clients about what they need, what kinds of "pain" they have, and which issues are most urgent.

Most lawyers are accustomed to being advocates and pitching. They go out and say to the client, "We have all these great practices. Which one would you like to buy?" The flaw in this approach is that you're talking about yourself, and not about the client's business. Pitching is saying, "I'm going into this person's office to try to sell them tax work," as opposed to saying, "I'm going to go listen to the CFO or the general counsel and ask them all sorts of business questions to see where they have pain."

Cross selling is proactively anticipating and identifying all the critical points of business of business "pain" that you can solve for the client. This includes:

- **Approaching the right clients.** Look at the firm's larger clients rather than the smaller clients. Think about the quality of your business relationship – does the client see you as being a business adviser? You should approach clients that respect you as a business person as opposed to a scrivener doing transactional work whom the client sees once a year.
- **Getting out of your pigeonhole.** Clients tend to pigeonhole lawyers. If they see you as someone who only handles sexual harassment suits you need to get out of that box. When you're cross selling you're inquiring what kind of adjacent legal work you could do. You should let the client know you can counsel them in how to avoid these claims in the first place. You've got to think about things you can do or pains you can identify that move you out of the limited role that a client sees you in.
- **Building a network of relationships across the client organization.** Cultivate as many friends or information sources at the company while you're working for them. This way when they hear about an opportunity, they will call you. In the course of the work for a large client, you should to start building relationships across different functions, with different executives at different levels. The most cross selling opportunities you're going to have are ones that you get based on a relationship where somebody thinks to pick up the phone and call you. So think about relationships, not about promotion.
- **Being persistent.** Cross selling efforts often begin with fits and starts. Instead, what must happen is to find ways for your attorneys see cross selling as a business development habit that is essential to creating satisfied clients.

The bottom line is, cross selling is about being of maximum value to your clients, and finding all the hurts you can heal and all the people who can be specialists in helping your client get better. This is really what you're after in terms of cross selling. It's not marketing or tricks or techniques.

For more on this topic, call:

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