



MPF FEATURED ARTICLE

MAKING “CROSS-SERVING” A BEDROCK VALUE

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Breaking point

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Embedding a cross-selling culture in your firm

Making cross-serving a bedrock value

David Freeman provides practical advice on identifying and overcoming the challenges of embedding a cross-selling culture in your firm

As a law firm leader, you are regularly consumed with finding ways to get your lawyers to pursue their best business development opportunities, with the best of the best often found through cross-selling.

Getting your lawyers to share your level of passion, however, is another story altogether.

For many lawyers, the concept of cross-selling evokes a negative reaction.

The reasons vary – for some, they fear the client will only see it as a desperate, firm-centred attempt to make more money. Others remember bad experiences in

their past, where the lawyer who was cross-sold did not perform well, resulting in serious damage to the client relationship. Others may see no financial incentive, and possibly a disincentive, in making cross-introductions.

To successfully initiate a robust cross-selling effort requires thoughtful planning and firm-wide commitment. In the following sections, I will suggest a structure to help you identify your firm's particular challenges, build approaches to address those challenges, and develop disciplines for embedding the proper behaviours into the cultural fabric of your firm.

Change the game

A good place to start is inside the heads of your lawyers. If you positively reframe how they perceive cross-selling, you're likely to get more of their time and energy devoted to it.

This can begin with a simple, but powerful change in language. I suggest eliminating the phrase 'cross-selling' from your firm's vocabulary, and replacing it with 'cross-serving'. Removing 'selling' from the equation reduces some of the negative impressions conjured up by that word, whereas 'serving' denotes a higher moral ground.



Making service a bedrock value can also act like a cultural glue to further unite the firm. A deep commitment to service can get lawyers working together for the common good, create stronger interpersonal connections and trust, make partners and associates less inclined to leave, and send positive signals to laterals that your firm is a great platform for growing a practice.

Cross-serving as a catalyst for change

Many firms get stuck when trying to figure out how to invigorate their overall culture of business development. The beauty

of concentrating on cross-serving is the cascade of positive benefits that can flow from this initiative. Cross-serving often delivers swift financial returns, which means firm members will quickly see fruits from their labour. This kind of success breeds additional success, so more lawyers should jump on the bandwagon once they see what the earlier adopters have accomplished. It can also serve as a trigger to set many other desirable actions in motion. **Firms that are fully committed to a cross-selling culture shift would likely:**

- Ask for more client feedback.
- Build higher performing client and industry teams.
- Deliver enhanced levels of client service.
- Know, like, and trust each other better.
- Work more effectively across offices and practices.
- Develop the right measures to track progress and eventual success.
- Develop leaders who effectively manage business development.
- Not allow slippage back to old patterns of behaviour.

The eight phases of a cross-serving culture shift

If there is anything you've learned in your role as a law firm leader, it's that significant change does not happen on its own. To help you effectively manage this process, the following eight-phased approach can be used to inculcate new habits into your organisation.

1. Make the big decisions

There is a huge difference between 'we should do more cross-serving' and 'we will do more cross-serving'. Firms need an unwavering commitment from senior leaders in order to withstand the inevitable fits and starts associated with a potentially disruptive culture change. Set your stake firmly in the ground by gaining their consensus on the importance of cross-serving, and eliciting their wholehearted pledge to do what it takes to make it a reality. To help get your leaders to this stage, you can ask them questions like:

- 'Are we happy with the way the firm is performing?'
- 'If we're not happy with our performance, is it important for us to make changes?'
- 'If it is important for us to make changes,

what must change?'

- 'After analysing the benefits of cross-serving, is this a change we need to make?'
- 'What commitments must we make as a leadership team to "guarantee" we will become better at cross-serving?'

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2. Identify obstacles

In the past you've probably tried to get more cross-serving activity to occur, only to be disappointed by the results. Successful implementation requires a clear-eyed look at what gets in the way of realising your cross-serving potential. **As an exercise, work with your leaders to identify the major obstacles that impede your progress.** The following are examples of some of the common issues you might be facing:

- Poor internal coordination/communication of opportunities.
- Internal politics/silos.
- Inadequate internal relationship-building and trust.
- Leaders who don't adequately manage cross-serving efforts.
- Poor communication of cross-services to existing clients.
- Misaligned compensation systems.
- Relationship lawyers who are reluctant to make an introduction.

3. Increase lawyer engagement

Before the plan can be implemented, you need people who care enough to dedicate the necessary energy to make it successful. As you've experienced, **you're in a constant battle for your lawyers' time and attention, so you must find ways to make their priorities align with yours.**

The following are several approaches for increasing their engagement to fire up the engines of change:

- Build the business case for why

this initiative makes so much sense, especially how it serves the best interests of their clients, makes for a stronger firm, protects client relationships, and increases compensation.

- Engage people in collaborative planning so they understand what needs to be done, and roll up their sleeves to craft solutions. This approach tends to create a greater sense of personal ownership, which should in turn increase their desire to see their plan succeed.
- Find the coalition of the willing who will do what it takes to make the magic happen. This front-end-of-the-bell-curve group can offer the proof others need to shows it's well worth the effort.
- **Put like-minded, high-passion people together to hunt as a pack.** Good teams can get more done, create better decisions, and increase accountability.
- Make it extremely clear that the firm values these activities by rewarding and recognising those who act in alignment with the cross-serving plan.

4. Create a plan

Along with leaders who are fully on board, and the identification of major obstacles and approaches for getting more from your lawyers, you must also build a solid plan of attack. During this phase you dissect the process to uncover your strengths and weaknesses, prioritise where to focus your firm's attention, determine the timing and

13 KEY ACCELERATORS OF CROSS-SELLING

- The client feedback accelerator
- The key client and industry team accelerator
- The exceptional client service accelerator
- The internal cross-connections accelerator
- The internal giving accelerator
- The internal approach accelerator
- The client contact accelerator
- The technology accelerator
- The compensation accelerator
- The key measures accelerator
- The internal communication/PR/education accelerator
- The accountability accelerator
- The leadership mega-accelerator

sequence of implementation, and **develop specific action steps and measures.** In Phase 6 of this process, I will suggest several key initiatives that can jumpstart the success of your cross-serving efforts.

5. Remove or reduce obstacles

It is one thing to identify what gets in the way of your success, and quite another to do something about it. In conjunction with Phase 3 (the planning process), take a good look at the major obstacles you identified and **come up with ways to tear down those walls.** You will find that many of the key accelerators presented in the next section can serve to both reduce your barriers and facilitate faster growth.

Cross-serving often delivers swift financial returns, which means firm members will quickly see fruits from their labour

6. Activate the accelerators

This brings us to the crescendo of the eight-phased process. You know you can't tackle all things at the same time, so think of implementation as a cascade. Just as in bowling, where you must hit a pin in just the right way to knock down the others, here, too, you must pick the right initiatives to 'hit' first to trigger other desired actions.

In the boxout, I suggest 13 'key accelerators' of cross-serving. As a savvy leader, you can strategically choose one or two that can both directly improve your performance and get the ball rolling in other areas. One example of how to activate this domino effect is by starting with the client feedback accelerator:

- **Deeply listening to clients** often uncovers the need to deliver higher levels of service (client service accelerator).
- **Improved levels of service,** especially with larger clients, may manifest in higher performing teams (client/industry team accelerator).
- To maximise effectiveness both before and after receiving feedback, lawyers may need to learn more about each



other to develop a better understanding of additional services they can offer to their clients (internal cross-connections accelerator, internal giving accelerator, internal approach accelerator).

7. Develop the right measures

I've specifically highlighted this key



accelerator because of its subtle, yet powerful importance.

While we typically watch the end-of-the-day numbers – more revenue in different practice areas from existing clients – you must keep a careful eye on the up-front behaviours that go into delivering those final results.

To track your progress in creating a healthy cross-serving culture, you can measure activity in your highest priority key accelerators. Examples might include:

- Client feedback meetings conducted.
- Meetings between cross-practice group leaders to discuss cross-opportunities.
- Internal presentations made by cross-groups to learn about other practices.
- Introductions to clients made by the relationship lawyer to new lawyers in the firm.

Making things stick requires you to interrupt the natural process of forgetting, and implement systems to keep people from sliding back into old, less productive patterns of behaviour

8. Prevent slippage

As stated earlier, real change will not happen on its own. To keep from being disappointed, and to minimise wasted time and energy, I suggest making the following sweeping assumption: **people will not follow through on their commitments to change unless they are actively managed to do so. In the book *Make it Stick*, the authors share a powerful observation – it is part of human nature to forget!** Making things stick requires you to interrupt the natural process of forgetting, and implement systems to keep people from sliding back into old, less productive patterns of behaviour.

This phase is where the lockdown occurs. To keep your well-intentioned initiatives from fading away due to a lack

of commitment and follow-through, you must find ways to keep your proverbial foot on the accelerator. **This requires people to step up to champion the process, and there is no one with greater power and authority than you as a law firm leader.**

As the person sitting in the buck-stops-here chair, **the managing partner must play the role of chief implementation officer**, acting as a 'Watcher' who holds people accountable to deliver on their commitments. You must handle the inevitable pushback – the active and passive resistance to new initiatives - and act as overlords to hold firm to the vision and prevent slippage back to less effective ways of doing things. Some effective 'watching' approaches include:

- Provide ongoing reminders to refresh recollection of key elements of the plan.
- Conduct regular training to improve effectiveness.
- Conduct internal PR to praise desired behaviour.
- Assign 'deputies' such as group or team leaders to implement sub-elements of the plan.
- Measure individual progress, and make those measures transparent.
- Develop a sense of urgency.
- Tie progress and success to compensation.

Creating a culture of cross-serving takes significant vision, courage, finesse, street-smarts and stamina. It requires you to communicate and evangelise more than you ever thought necessary. By developing a well-conceived plan, reducing obstacles, pushing the right organisational buttons, and not allowing people to fall back into lower performance habits, you can leapfrog past your competitors and reap substantial rewards.

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WANT MORE GUIDANCE ON CROSS-SELLING?

David Freeman is the author of ARK Group's bestselling book, *Creating a Cross-Serving CultureShift: Mastering Cross-Selling for Lawyers and Leaders*. This book outlines a proven strategy to address the cultural change that is necessary to a successful cross-selling initiative, and help you drive this in your firm. This book is available to buy on the ARK Group website: www.ark-group.com.