



## Law Firm Leadership

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There is no shortage of discussions on cross-selling in our firms, but one important factor that often gets short shrift is the role of leadership in the success of these initiatives. Without effective leadership, cross-selling efforts can be episodic at best, or abysmal, “let’s-never-do-that-again” failures at worst. To develop a solid foundation for success, leaders must develop the right environment, get off to the right start, and have the tenacity to keep momentum alive over the long haul.

### Challenges of Cross-Selling

It doesn’t take a genius to recognize the huge rewards that can come from an effective cross-selling process. If there is so much bounty that can be achieved, why aren’t we good at it? The reason is that there are many obstacles leaders must overcome in order to get cross-selling to take hold. We have siloed structures that isolate lawyers from each other. We have compensation systems that do not reward (and at times, actually disincentivize) these kinds of activities. We have lawyers who are afraid of turning over their valuable assets (their best clients) to others in the firm for fear that someone else will screw up the relationship. We have a set of personalities that do not know, or want to know, how to properly sell in these circumstances. Our internal communications are seriously flawed. We don’t know what we have to offer in terms of practices, personalities, and backgrounds. We don’t even really know our clients. Many lawyers are so focused on their practice areas that they haven’t expanded the relationship from being seen as a subject matter expert to becoming a trusted adviser. Finally, the biggest gap in many firms is the lack of an accountability and follow-up process. When we see studies that say it takes around seven meetings with a potential client to get work, when we read another study from the Legal Sales and Service Organization (LSSO) that states that approximately two-thirds of sales leads are not followed up, it is no surprise that lawyers usually do not have the systems or stamina to capture work that could be theirs. Imagine what our revenues would look like if we had a process for staying on top of our best prospects!

### Leading the Effort

Some firms get it. One marketing director told me his sole responsibility is to find more work from existing clients and to build systems to make it happen. It takes a blend of administrative leadership with lawyer-leaders to succeed. Since most marketing professionals already see the potential in cross-selling, the bulk of our attention should be on getting department heads, practice group leaders, team leaders, managing partners and the executive committee to support this process. Leadership can also arise from the grass-roots level. In one firm, the partners in a practice group in one city claimed (facetiously or not) that they were tired of hearing all the good press about another part of the firm, and wanted to show they could make good things happen as well. In another firm it was driven by a young partner who wanted to build his book of business from other firm lawyers. Wherever it comes from, here are four major elements all leaders should consider:

### ***Culture***

Developing an environment of trust is a major success factor. This can be in exceedingly short supply, especially in firms that have recently merged or that have offices in different locations. Successful leaders recognize that interpersonal connection is a key that unlocks trust, and they build activities that encourage face time between different “communities” of firm lawyers. Firm retreats, cross-practice group meetings and mixers, sending lawyers to other firm offices, liaisons between different groups, videoconferencing, inviting other group members to join marketing pitches, and internal educational presentations are but a few of the tools of the culture-focused leader.

## ***Planning***

Developing a strategic approach can make the process run more smoothly and result in a higher success rate. It begins with creating a targeted list of clients. You must also start with lawyers who really want this to succeed. This raises an interesting dynamic that should be explored. Cross-selling, as it is typically done, is more of a “take” than “give” process. That is, it usually involves looking through a list, identifying lawyers to approach, and asking to receive introductions to their best clients. Given what we observed earlier regarding trust issues, this behavior might be viewed as “pushy,” which often is met with active or passive resistance. Contrast this with a “give” model. A practice group scours its client and referral list, identifies opportunities to make introductions to others in the firm, and contacts the right lawyers to set up meetings. One would hope the receiver of this “gift” would be more open to reciprocating by offering up opportunities of his or her own. I have seen complementary practice groups go through these kinds of give-and-receive sessions and the opportunities flow like water.

It is also up to leaders to build the right teams. Getting the right mix, based on the client’s needs rather than the firm’s (or the politics of individual lawyers) is an important discipline to maintain. And once those teams are established, there must be leadership within them. High performing teams engage in a process of understanding their roles and responsibilities to both the clients and to each other.

Another important element of planning is determining what to measure. We typically look at end-of-the-day measures like the number of new matters and billables. To encourage the right behaviors, however, we should measure the foundational activities that get us to those numbers. Measure cross-group meetings focused on cross-selling, the number of meetings between individual partners and teams, and the number of meetings arranged with clients. If we measure and manage these activities, we will achieve our financial goals.

## ***Implementation***

The biggest breakdown in almost any initiative is the failure to follow through, and this is where our lawyer-leaders can add the greatest value. They need to make it a top agenda item at all times, provide constant reminders, hold people accountable, and get commitments for action by a specific time. Many leaders engage their assistants to develop a tracking system and they make the process very visible while enforcing sanctions for failure to comply with agreed-upon commitments. Some firms tie cross-selling activities to a portion of compensation. Complementary group leaders can work together to provide forums that allow lawyers to engage in the right kinds of conversations and develop very specific action plans. Many leaders also understand that cross-selling is a skill and therefore provide the training and support needed to help group members build a solid approach strategy and overcome “call reluctance.”

## ***Communication***

As our firms get larger, communication suffers. What used to be learned in the hallway now gets lost between floors and cities. Our leaders need to develop an organized approach for receiving and sending information that can help drive cross-selling. One topic that often needs constant attention is compensation. Many leaders don’t understand how cross-selling is rewarded, and it is even less clear for the rank and file lawyers. Often there is serious misperception, and it is up to the lawyer-leaders, with help from the compensation committee, to clarify the situation.

It is also valuable to communicate progress and success. It reinforces the strategy, gets people on the bandwagon, and feeds egos. Get the message out across practice groups and geographies and you’ll find people knocking at your door wanting to be a part of the game.

## ***Conclusion***

There is no faster path to increased revenue than through cross-selling. Leaders using the right tools, mixed with the right touch, can accelerate the process and make their firms a more exciting and profitable place to work.

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