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Serving Clients in New and Different Ways: Cross-Selling Culture Champions Series

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Brian Cromwell, a partner at Parker Poe Adams & Bernstein in Charlotte, NC, hopes to avoid too many repeat clients. According to him, “if your corporate client constantly finds themselves being investigated for white collar crimes, they’ll be out of business very quickly.” Because of that, Brian must rely heavily on his partners and colleagues as sources of referrals for new matters.

Brian serves as the Marketing Partner of Parker Poe’s Charlotte office, and focuses on building “structures to help us make sure we are always talking to each other, always finding opportunities to serve clients in new ways and in different areas.” To that end, Parker Poe has interdisciplinary teams for their large clients that meet on a monthly basis. “For one large client, we meet regularly for an hour, discussing how to grow our relationship with them. We identify the people at the client with whom we work and we share what we have learned about them,” Brian explains. Most of the team members already work with the client, so when Parker Poe brought on a new lateral attorney whose practice specialized in areas that they had not provided before, the client team reached out to their contacts in hopes of introducing the lateral to the people that might allow the new lateral to make inroads.

Parker Poe uses other techniques to cross-sell their services to companies. “We also reach out to different areas in the company and asked them to present to our interdisciplinary teams focusing on what they do and how they are structured. We often ask them if they know specific people in the company and ask them to make introductions. It is not a one way street. When we have the right contacts, we often facilitate internal introductions at the company, which can help them advance their careers. Needless to say, they are very appreciative.”

Brian is always looking for ways to get his partners to meet his contacts. As an example, the firm is very focused on giving back to their communities, and Brian serves on several Boards. “Many of the people on these Boards are pillars of the community, and once I get to know more about them, I make introductions to others in my firm who can help them in various capacities.”

Brian also understands how to leverage relationships with certain clients to gain a triple win, where that client, other clients, and the firm all benefit. One example is that the firm often rents a suite from one of their top clients for events and also sponsors many causes that their clients support throughout the year. “This approach demonstrates our commitment to support the client’s business, we invite other clients to these very much in demand events, and we also invite firm lawyers from various practices so they can build new relationships in an unforgettable setting.”



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Brian Cromwell, Partner
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Sometimes, the direct ask is the way to go. “We recognize we have clients for whom one of my partners is doing a lot of work. At the same time we recognize there are opportunities to do more in other areas. We will meet with the client, identify the work they are sourcing elsewhere and ask for the opportunity to introduce them to our lawyers in an effort to pitch our skills, our approaches, and our fee structure. At worst they politely decline . . . at best we get a shot at new work if and when they decide to look for new counsel.”

One of the keys to effective cross-selling is identifying ways Parker Poe lawyers can help their partners’ clients in times of need. One approach Brian uses is to help his partners’ clients in areas within his core competency to strengthen his partners’ relationship with the client. For example, a partner called him seeking assistance for a client with a daughter who ran into trouble with law-enforcement. “When you help a client get their child out of trouble, it is something they never forget. They will associate the assistance with the law firm.”



Brian believes a law firm’s compensation and rewards system needs to be aligned with cross-selling to help drive desired behavior. “The ‘what’s-in-it-for-me’ issue at many law firms can be considerable, so the law firm’s management team must provide a carrot. At one of my prior firms, they offered a sizable bonus for the lawyer who engaged in the most cross-selling. At Parker Poe, we use technology to track cross-selling activity, and lawyers can receive compensation when they act in ways that support cross-selling efforts. Firms should also institute a robust credit sharing policy. Some firms have an internal appeals board, where if someone feels the sharing arrangement was not fair, they can go to the Board for a redetermination.”

Beyond receiving direct rewards, lawyers should take a more global view of how their actions can benefit the organization as a whole. “There are times when I do things that do not immediately benefit me. For example, because of my civil work in Mecklenburg County Teen Court, I met a young man who asked if he could intern at our firm. He said his father was the General Counsel for one of our clients (not mine), and that we had a reputation for providing excellent training. I invested a lot of time setting him up as an intern, and while I received no financial reward for doing it, I know it added significant value to the client relationship. I personally believe if all lawyers take on a mindset of cross-service, the resultant rising tide will lift all boats.”

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