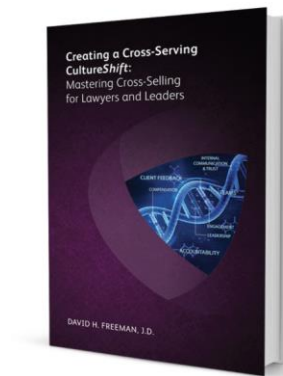


Book Review: 'Creating a Cross-Serving CultureShift: Mastering Cross-Selling for Lawyers and Leaders,' by David Freeman

Amy Knapp on MARCH 11, 2016



No one will disagree that it is often easier to get work from existing clients than from prospective clients, yet huge obstacles to cross-selling still exist in law firms. In his book, [*Creating a Cross-Serving CultureShift: Mastering Cross-Selling for Lawyers and Leaders*](#), David Freeman gets to the heart of the matter and identifies a need for a cultural shift as a critical step in creating a healthy cross-selling environment within law firms. The book is a must-read for any firm looking to institute client teams, business development or cross-selling programs, or other shared servicing or shared business development programs.

For Freeman, the key to developing the most efficient and sustainable cross-selling environment within law firms hinges on removing institutional obstacles and creating a culture that rewards and recognizes desired behaviors. His process is rather straightforward, but it takes a meaningful commitment from law firm leaders and the firm's attorneys to execute. For firms that get it right, the rewards can be huge.

So how can a firm change its culture and become a true cross-selling organization? According to Freeman, the first step is for law firm leaders to recognize the importance of cross-selling (or as he calls it, cross-servicing) and commit to building an environment which supports and promotes it (Chapter One). Next he outlines the need to increase motivation to act by building the business case, enlisting willing participants to achieve early

success, inspiring collaboration, and other actions (Chapter Two). In Chapter Three, Freeman focuses on removing obstacles to cross-selling. In Chapter Four, he identifies 13 key “accelerators” that will help to drive change, include client feedback, client and/or industry teams, internal communication and promotion, and accountability, among others. In the final chapter, Freeman again urges firm leaders to commit to the principles outlined in the earlier chapters to achieve real change and reinforces the sincere need to be “all in”.

What makes Freeman’s book different from other books on sales and cross-selling is his focus on the need for change at the most fundamental level. Generally speaking, other books put an emphasis on teaching and outlining the sales and/or servicing *process*, but don’t address the real need for enterprise-level change in behavior, i.e. creating a CultureShift as Freeman calls it. And for those of you who have ever failed to quit a bad habit, lost the motivation to exercise half way through January, or put back on those five pounds you worked so hard to lose, you know the key to permanent change lies in modifying habits and routines, not just in executing the steps. So a business development coaching program that teaches lawyers how to be better sales people, but doesn’t address institutional obstacles to cross-selling, is hampered from the start. Or a client team initiative that doesn’t properly reward or hold accountable participants will not be as successful as one that does. Changing behaviors and changing culture is the only way to address these obstacles at their source.

The practice of law has changed in fundamental ways in the last 15 years. Technology, competition, ease of market entry, access to information and other factors continue to drive changes. Law firms are investing heavily in IT, marketing, knowledge management, outsourcing, and other critical areas to keep pace and ward off competition, yet few are looking inward and asking the critical question “What cultural changes do we need to make to stay relevant in today’s marketplace?” For the ones that do ask, David Freeman’s book provides the roadmap they need to effect real change and develop a culture of collaboration and cross-selling.