



Rainmaking 101: Cross-Selling

By: Mark Powers and Shawn McNalis



In the first four issues we have concentrated on “Who to Talk To” in your word-of-mouth marketing campaign. In this issue we will discuss several ways to market your services to *existing clients*. This is called “cross-selling” and is one of the least expensive marketing options available to you. Why? Because you’ve already spent the time, money and effort to get the client in the door – there are minimal marketing costs associated with continuing to serve that client and therefore they are more profitable.

In cross-selling you educate your present and past clientele about your range of services, with the hope that they will want to use more of what you have to offer. This includes clients who might need advanced services in the same practice area you’ve served them in the past and clients who could be served by another practice area altogether.

Cross-Selling Your Client Base

Select past clients by looking at your client lists. If your client information is on a database that allows you to sort by given parameters or fields, it will be easy to generate reports or lists of those who meet specific criteria. If you are not that well organized, delegate a staff member to hand sort your files using your list of criteria.

For example, an Estate Planner could search for past clients that might need advanced estate planning services by sorting through the following criteria: age, asset level, past service provided by the law firm, whether the past client is a business owner, whether it is a family-owned business, etc. Develop similar lists of attributes that are reliable predictors of your client needs and then strategize about cross-selling or upgrading these groups. There is a great deal of hidden revenue to uncover in this process.

Once the sorting is complete, the next step is to re-establish communication with the targeted group of clients.

There are several ways to do this, but most of our clients find that it is most effective to reconnect with a group by sending a letter. Add as much personalization as you can to your letter to increase its effectiveness – this should include the client’s name and perhaps a brief handwritten note which states something like: “*I look forward to hearing from you,*” or, “*I have some interesting new tools (or strategies) I’d like to discuss with you.*”

Cross-Selling Letter #1

The following is a sample letter from a real estate attorney informing his client of further services provided by the firm and offering a complementary consultation. This letter is sent as part of the post-closing process -- before the relationship with the client fades.

Cross-Selling Letter #1

Dear _____ (name):

We at (firm name) enjoyed meeting and working with you on the purchase of your new home. We want to take this opportunity to again offer our congratulations. In addition to real estate transactions, our firm has expertise in a wide variety of legal matters including the following:

- Corporate Law
- Estate Planning & Probate
- Family Law

We would be delighted to assist you in any future matters or transactions in which you may need the assistance of an attorney. We offer an initial 1/2 hour consultation at no charge to you.

Please give us a call if we can be of further assistance.

Sincerely,
(name)

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Cross-Selling Letter #2

This letter invites past clients to a small, informal, information session. Typically these information sessions are held in your conference room, accompanied by simple refreshments and involving less than 10 people at a time. You can also let your clients know you will meet with them individually to answer further questions.

Cross-Selling Letter #2

Dear _____ (name):

The new _____ law is becoming more and more complicated. There are many aspects of it that may affect you (or your interests). Because you have placed your trust and confidence in me in the past, I feel I should keep you informed of changes in the law that may have important consequences for you (or your business).

Many people are not making the best use of this law simply because they are uninformed. I believe you should have the opportunity to learn what your options are and how this change affects you.

In order to remedy this situation I am holding a small, informal information session at my office on _____ at _____. Please join me and get your questions answered. Give us a call at _____ to RSVP.

I look forward to seeing you again.

Sincerely,
(name)

Cross-Selling Letter #3

This letter is for the attorney who is cross-selling within his own client base, but it can be modified to suit cross-selling a client who has worked successfully with one member of a legal firm and is judged to be a candidate for other firm services.

Cross-Selling Letter #3

Dear _____ (name):

Here at (firm name) we've begun the process of updating our past client files. We realized we had not heard from you for some time. We would like to take this opportunity to say we've enjoyed working with you in the past and express our willingness to assist you in any further legal matters.

Our firm has grown and we now include _____ (list of practice areas) as part of our services. Give us a call or drop by if we can be of additional help. We will make a 1/2-hour complimentary consultation available to you if you need to have any questions answered.

Please give us a call at _____. We look forward to seeing you again.

Sincerely,
(name)

The Next Step

Compose a customizable form letter inviting your clients to:

- Call and schedule an appointment with you, or
- Attend a small, informational session in your office conference room

Remember: buried within your client files is a great deal of potential business. It is up to you to access it. Cross-selling is one of the easiest, least expensive and most ethical ways to market your services.

Mark Powers, President of Atticus, Inc., and Shawn McNalis, co-authored "The Making of a Rainmaker: An Ethical Approach to Marketing for Solo and Small Firm Practitioners," are featured marketing writers for Lawyers, USA and a number of other publications. To learn more about the work that Atticus does with attorneys or the Atticus Rainmakers™ program, please visit www.atticusonline.com or call 352-383-0490 or 888-644-0022.