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The Cross-selling “Phobia”

Cross-selling programmes are becoming much more common in professional firms of all sizes, simply, because they work. In conjunction with a planned marketing programme, a thorough cross-selling programme can take a firm a long way toward meeting the needs of its client base and, at the same time, help in achieving firm wide and individual departments’ business development goals.

Traditionally, there has been a reluctance to embrace cross selling as a means of bringing in work. However, resistance to cross-selling programmes is not as prevalent in small professional firms as it is in mid- to large-size firms. The reason for this is as clients increasingly demand a fuller range of services, the smaller professional firms are having to provide their clients with as many services as they are able to in order to survive in today’s marketplace. Larger professional firms, on the other hand, experience varying degrees of resistance to cross selling. Research has shown that the major underlying reason for resisting cross selling as a concept and reticence to adopting cross-selling comes down to fear.

Any serious attempt by a firm to implement and get results from a cross-selling programme will fail unless the fears and concerns of professionals are addressed and resolved beforehand. Many firms have attempted to implement a programme without planning for the inevitable resistance; as a consequence, they get mediocre results.

The major concerns voiced by professionals who resist cross-selling are; fear of offending clients, fear that the existing professional-client relationship will be compromised, fear of engaging in “selling” tactics and reluctance to commit potentially billable time to cross-selling efforts.

Fear of offending clients

Many professionals interpret the cross selling of services to mean that hard-nosed, pushy sales tactics will be used on their clients. This perception is usually a misinterpretation of the intention and tactics behind most cross selling programmes. Successful programmes are developed with the intention of thoroughly assisting clients in resolving their business and personal problems. Thus, cross selling is not an attempt to “sell” a service that is not needed by the client. Instead, cross selling is a process by which to understand fully and meet all the possible current and future needs of clients.



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Because cross selling is a process, there is no place for “in your face”, hard sell, sales tactics. The approach that really works includes spending time to ask questions and listen to both what the client is saying and also to what he is not saying (underlying, unspoken, concerns). Only then will the true need for other services become apparent and “cross-selling” become appropriate.

A number of professional firms are creating vehicles to listen to their clients: client surveys, industry meetings, engagement debriefings and, most effectively, one-on-one meetings. Instead of offending clients, these methods are building good will and further cementing existing professional-client relationships.

Fear that the existing professional-client relationship will be compromised

The fear of compromising existing relationships stems naturally from the fear of offending clients. The pattern of resistance goes something like, “If I offend my client, it will threaten the stability of the work I am currently doing instead of gaining additional work from cross-selling.”

To overcome this pattern of resistance, it is important that a cross-selling programme is supported by suggested tips and techniques to avoid the possibility of causing offence. One technique that can be used to approach the subject of additional services with a client is the re-entry statement. Examples of re-entry statements are as follows: “The last time we spoke, you mentioned that your employee benefits programme was not meeting the need of your changing workforce. There are some new plans that my partners have been implementing for a few of our clients that may be of interest to you.” Or, “You said you have chemical by-products resulting from your manufacturing process. Have you had an environmental impact assessment done to alert you to potential problems?”

Other effective techniques for professionals include ways to approach different personalities and styles of individuals. For example, some people are influenced by visual stimuli such as supporting documentation and reports, newsletters, newspapers and television. Also, interview techniques can be used to probe for clients’ needs over the course of time when there is no immediate need. Properly practised and used, these techniques can improve communications, maximise efforts and even enhance existing professional client relationships.



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A deeper fear of threatening the existing professional-client relationship can be more prevalent in larger firms where the professional staff includes many lateral hires. With laterals, the pattern of resistance may be, “If I engage in cross-selling services to my existing client, the client will end up liking the work of another partner in the firm better.” Or, “I might lose the client if the other professional isn’t responsive or his work is not as good as mine” Thus, there is the threat of losing the relationship with the client and perhaps a subsequent reduction of internal power within the firm. This fear, common in many firms, poses the strongest threat to any successful programme.

To overcome resistance based on this fear, it is necessary to address the potential threat upfront and reassure professionals that every attempt to maintain existing relationships will be taken. In other words, a checklist of steps to take to protect the existing professional-client relationship must be developed, discussed and distributed. For example, all meetings could be scheduled to include the lead professional. Or, at the very least, other partners might be asked to alert the lead professional to all planned communications with the client.

However, there is no guarantee that the existing lead professional-client relationship will not be threatened. People are unpredictable, and even with all the reassurances in the world, the chemistry or work product between one professional and the client may be preferred or rejected by the client for a variety of reasons.

The most effective method of reassuring professionals that the existing relationship will not be threatened is word-of-mouth testimonials that will occur as any cross-selling programme progresses. If one professional with strong lead relationships has introduced other professionals in the firm to his or her client and the client was returned intact, this will encourage participation among hesitant professionals.

Fear of Engaging in “Selling” Tactics

Selling tactics are abhorrent to most professionals and are considered unethical to many. The idea of implementing a cross-selling programme conjures up images of offensive sales tactics. Because of this resistance, many professional firms have begun referring to their cross-selling programmes as “integrated service plans” or a “full-service approach.” The change in language removes the negative connotations associated with selling. Regardless of the name of the programme, the goal must be to meet all the service needs of the client base in an effort to help them improve their business or personal situation.



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The most important element in determining the success of cross-selling programmes is the preplanning stage. It is during the preplanning stage that a skill assessment of the firm's professionals, based on abilities and levels of experience, is made. For example, newer associates will need the most help to do their part to implement a cross-selling programme successfully, whereas senior partners may need only a session to describe the programme and a brief review of particularly successful tips and techniques, such as re-entry statements and interview tactics. A thoroughly planned and well-executed training session for participants at all levels will ensure that the use of "selling" tactics is minimized.

Reluctance to commit potentially billable time to cross-selling efforts

The resistance to cross selling that comes from not wanting to allocate the necessary time arises for many reasons. In some firms, planned cross-selling and marketing hours are not treated equally with billed time for compensation purposes. Firms may say they want professionals to cross-sell, but at the end of the year, if a professional's billed time is not as high as that of other partners, he or she may be compensated differently. Firms that are committed to rewarding cross-selling efforts (not only results) will have the most success with their programmes.

Other resistance comes from a lack of willingness to follow up. Any cross-selling effort takes time. On average, it takes three to four one-on-one contacts, whether by phone or in person, with a client to appreciate a need or potential need, to present the service possibilities and agree on a course of action.

Summary

Cross selling is not a one off project. It is a way of working, and over time, should become part of the culture of the firm. It is a mutually beneficial process, undertaken, to add value to the client and to bring additional kudos to the firm. Professionals need to be committed to the ongoing nature of the cross-selling process. Substantial results should occur in six months to two years after initiating a structured programme.

Sustained results will be realised thereafter. When properly executed, many of the behaviours associated with cross-selling will go a long way toward fulfilling the full range of services that today's sophisticated and demanding clientele require from professional firms. To overcome resistance to cross selling, professional firms must adopt proper planning procedures; provide necessary skills training and thorough implementation and systematic reporting methods and follow-up efforts.