

Cross-selling Healthcheck

What are the core factors that affect a firm's ability to cross-sell its services well?

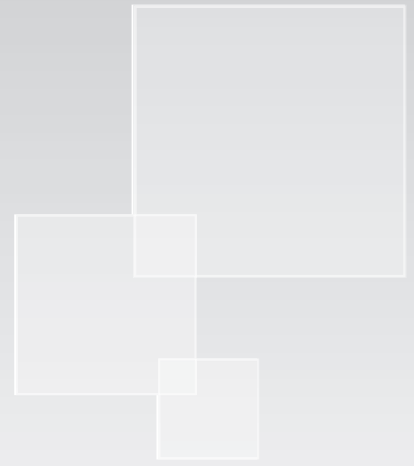
This is a diagnostic tool for professional services firms, which analyses eight core aspects to cross-selling. Complete the following 32 statements to identify the strengths and weaknesses in your firm's cross-selling capabilities.

PACE Healthcheck on cross-selling

		Just like us	Somewhat like us	Not really like us	Not like us at all
1	There have been very few incidents in our firm where a service that has been cross-sold to a client has been delivered badly by the practice area responsible for handling the work.				
2	Our professionals take time with their clients to understand the broader business issues that these clients are facing and the other sorts of advice that they are using - or may require in the future.				
3	Our average professional with responsibility for cross-selling has an excellent understanding of the services and capabilities that we have in all the rest of the firm.				
4	When our professionals attempt to cross-sell another of our firm's services, they are always able to give the client the specific benefits of this collaboration <i>from the client's perspective</i> .				
5	It is common in our firm for people from different practice areas to sit down together, discuss a client's business and the issues faced by the client and then consider – in the light of this – what potential additional services of ours may be of value to the client.				
6	All of our professionals responsible for cross-selling have been given specific, relevant training in how to sell to clients.				
7	Our prime way of organisation is by market / client facing teams, not professional practice areas.				
8	The professionals here make a real, concerted effort to talk with people in other parts of our firm.				
9	Professionals do not want to sell to their clients the services of other practice areas of our firm, because they are concerned that their personal influence with these clients will be diminished.				
10	There are incentives, including worthwhile financial incentives for those professionals who successfully cross-sell the services of other parts of the firm.				
11	Our professionals have no discomfort in talking about our firm's other services and their specific application to their clients' situation, because they have such a good understanding of how their clients' businesses operate and how our type of work and advice generally fits within this.				
12	Generally there is mutual trust and respect between all the different parts of our firm. We have no 'poor relations' or 'pariahs' here.				
13	We make a measurable demand upon our fee-earners that they must continually develop and increase their knowledge about our firm and its capabilities.				
14	Our professionals who manage client relationships are not only seen as expert in their practice area but are regarded by their clients as expert in the client's industry and the specific client's business.				
15	We do not have any physical barriers - (e.g. different floors, different office locations) - that create barriers to open communication between people working in different parts of our firm.				
16	Within the clients to whom we would like to cross-sell more services, we have strong relationships with those people who appoint professionals like us for a wide array of work – not just the work we carry out today.				
17	The professionals in our firm are concerned that the introduction of a new service to one of their clients (delivered by another office or practice area) may result in the client realising that the firm can work for lower fee rates than the original professional has been charging – thereby leading to a threat of downward pressure on fees overall.				

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18	When our professionals approach colleagues about cross-selling to the clients that these colleagues manage, they always have a considered and convincing explanation as to how <i>their colleague</i> will benefit from the initiative.				
19	The people who run the various parts of our business demonstrate continually through their actions and words that communication and contact with others throughout the firm is vitally important.				
20	We have on-going marketing campaigns that are specifically aimed at clients where we believe there is a good prospect of cross-selling further services. These campaigns, targeted toward the key decision makers, promote and raise awareness of various capabilities of our firm that the client is not utilising today.				
21	There are no weak offices, departments or practice areas in our firm whose services our professionals would be reluctant to cross-sell.				
22	Professionals do not want to sell in the services of other practice areas of our firm to their clients, as they believe that they 'own' their clients for all time. As and when they leave the firm they wish to take these clients to their new practice, with the fewest barriers of allegiance to our firm.				
23	Our professionals responsible for managing relationships (with those clients where it is believed there are opportunities for cross-selling) are constantly referring to the other relevant capabilities that the firm is successfully delivering to other clients. This ensures that clients do not quickly 'pigeon hole' us as being specialist in a small number of areas where they employ us today.				
24	We make a point of regularly finding ways of bringing new people (from different practice areas) into our client relationships in some way.				
25	There are financial barriers in our firm that make it not worthwhile for professionals to cross-sell the services of other departments, practice areas or offices.				
26	Professionals do not want to sell in the services of other practice areas of our firm to their clients, as they are concerned that the incoming presence of more capable colleagues will highlight some of their own inadequacies.				
27	We create opportunities for key people within our most important clients to meet with some of our other clients where we carry out very different types of work.				
28	The professionals in our firm are not concerned that the introduction of a new service to one of their clients (delivered by another office or practice area) may result in the client giving them less work.				
29	Our professionals are reluctant to sell to their clients the services of other practice areas of our firm, as they are concerned about not knowing what is going on with these clients.				
30	Our professionals who manage those relationships where we believe there is scope for cross-selling, have specifically questioned those clients on their feelings and policies toward consolidating more of their work with a smaller number of firms like ours.				
31	Our professionals will always provide maximum effort and resource to carry out a piece of work that has been cross-sold on their behalf, even if the work is not as exciting, sizeable or profitable as other work in which their practice area is currently engaged.				
32	We have a successful education programme that continually teaches both our professional staff and support staff about the new capabilities that the firm can deliver.				



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