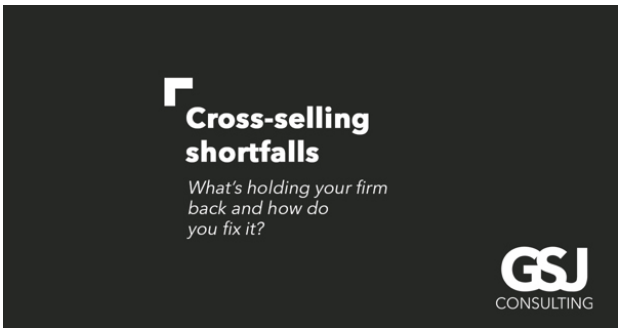


Why your cross-selling efforts might not be working and what you can do about it

Date: Wednesday December 17, 2025

For professional services firms, cross-selling is the Holy Grail. The opportunity to leverage off cross-selling opportunities is the reason why most partners join firms. As a result, it's a topic at every partner retreat, business development strategy meeting, key account management team meetings and annual partner appraisals.

But here's the truth: most professionals fail miserably at cross-selling. Their firm's cross-selling efforts feel ad hoc, dependent on individual rainmakers or are overly reliant on enthusiasm rather than strategy.

So here are some identifiers of what might be holding back your firm's cross-selling, as well as some steps you can take to fix it.

The trust gap

The problem

Most firms assume cross-selling is a systems or visibility issue. That's because the reality is much harsher to deal with: Trust.

Partners and senior practitioners will only introduce their clients to people they trust.

If a fellow partner doesn't know what you do, has never worked with you, or doesn't like the way you send them emails, then it really doesn't matter how many times you or the Managing Partner asks them for introductions to their client – it isn't going to happen!

Life fact: people protect the relationships they've spent years building.

The fix

The fix to this problem is simple. But it requires intention: create opportunities for other partners to know what you actually do every day; what your real strengths are in a human way.

Take partners you want to work with out for a coffee with a clear purpose: to show them that you are trustworthy, and it will be beneficial to them to put you in front of their client.

To kick the trust gap problem, you need to start thinking about cross-selling as a relationship-building issue, not a revenue goal.

Accountability

The problem

When something has no owner, it becomes optional.

When it comes to cross-selling services, many firms rely on the goodwill of the firm's partners. They assume partners will refer work because it's "the right thing to do." But in a busy practice, optional tasks are the first to slip.

The firms that get this right treat cross-selling as a measurable behaviour. They track internal introductions, monitor follow-up actions and report cross-service engagement as seriously as they track billable hours or utilisation.

The fix

If you want cross-selling to work, someone needs to own it, and all the other partners need to be accountable to that person.

A siloed business development strategy

The problem

Many firms unintentionally reinforce silos through their own marketing and business development efforts. Websites, brochures, capability statements and pitches are often organised by service line – not industry expertise.

This is convenient internally, but at the same time is confusing for clients who don't buy "service lines"; they buy solutions to their problems.

When your external marketing and business development materials are fragmented, it becomes harder for clients to understand the full breadth of what your firm offers. And if clients can't see it, it doesn't matter how hard you try and cross-sell, it's doomed to fail!

The fix

A more effective approach is to frame your capabilities around client problems, sectors or current themes.

It's easier to cross-sell when your story is built around the client's world, not your internal org chart. Your client service doesn't stop with your specific area of experience and expertise. It extends to a complete solution for the client.

Assumptions

The problem

One of the biggest myths in professional services is the belief that "our clients know what we do."

They don't.

They only know what they buy from you.

Clients are busy. They're not constantly reading your website, your capability statements, your newsletter updates or news of your latest lateral partner hire.

Simply put, familiarity with your brand does not translate into awareness of your firm's capabilities.

The fix

Firms that excel at cross-selling turn client education into a routine. This can be as simple as quarterly check-ins that include a "what's new at our firm" update or even as basic as regularly updating client contact cards to show promotions and new joiners.

If you don't tell clients what you want them to know, they'll never know – because they're unlikely to go looking. Or worse, they go looking elsewhere for their new problem solver because they don't know you can help.

I'm driving in my own lane, unaware of the other lanes

The problem

Professionals hear buying signals all the time. But are they buying signals for what they are selling or for what others in the firm might be able to do?

Too often, when it comes to cross-selling, professionals miss opportunities because they don’t understand what their fellow partners really do and the keywords that might provide cross-selling opportunities. For example, comments like: “We’re expanding”, “We’re having trouble with staff turnover”, or “We’re looking at new IT systems” go unnoticed to a claims lawyer unfamiliar with corporate M&A law.

The fix

This is where proper training with an experienced business development expert matters. Teams need to know what problems link to which areas of the firm, and they need the confidence to raise issues in a way that feels natural and collaborative, not pushy.

A short “trigger guide” session with a seasoned business development expert makes a huge difference here.

Ultimately, cross-selling is a listening skill.

In a nutshell

Firms that succeed with cross-selling don’t rely on enthusiasm or personality. They build:

- trust between teams;
- clarity about who does what;
- confidence in how to talk about others;
- incentives that reward the right behaviours;
- marketing and business development that frames problems as well as services and capabilities;
- routines that educate clients;

and a simple workflow that makes introductions easy.

If your cross-selling isn’t working, it’s rarely because people don’t want to do it. It’s because the system around them makes it hard. Fix the system and the behaviours will follow.

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