



HOW TO GET MORE WORK OUT OF YOUR CLIENTS AND YOUR FIRM

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It's usually easier and more cost-effective to win new work out of an existing client or colleagues in your firm than it is to acquire a new client altogether. But that doesn't mean it's altogether straightforward. Readers may know the risks of Cross-Selling as a BD strategy (or Crass-Selling as one firm put it) - but I'm all for **Cross-Serving** clients.

So if you're struggling to know how and when to find more work out of your loyal base of contacts, here are 16 ideas on how to win more work from both sources.

TO WIN MORE WORK FROM YOUR CLIENTS

To begin with, let's look at 12 different ways I've seen professional firms win more work out of a client. Each one of these tactics can work in the right circumstances.

- 1. Find out what products and services your client uses.** Identify any gaps and introduce someone in your network or from your firm who can fill it. Your client will usually appreciate the help and will be more likely to see you as the "go-to" adviser.
- 2. Help identify your own blindspots with a client.** Call in someone from your firm to take a look at an area in which you haven't yet got any traction and to analyse why that is. A fresh set of eyes can make all the difference.
- 3. Find out the timing of panel reviews.** This can give you the opportunity to introduce a new section of your firm and also give you the head-start in preparing a winning tender.
- 4. Introduce yourself to procurement.** If you're only servicing one part of the business or only one section of your firm is being used, let them know about your firm's whole offering. Ask to be included in the procurement panel.
- 5. Conduct some client feedback.** This can help you spot where the client is weak and uncover new cross-referral opportunities.
- 6. Conduct a strategy session.** Both New Year and End of Financial Year lend themselves to a strategy session, where you get to understand the client's objectives for the next 24-36 months. Bring along a specialist who you know could really add value.

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7. Perform a review. Instead of strategy, get together to review the past 12 months. Find out what worked and what didn't. Talk about surprises and challenges and find out how your services and contacts could help.

8. Introduce them to someone new. Sometimes the best way to ingratiate yourself to a client is to introduce someone from an unrelated field. Just remember the introduction has to be relevant, the person you introduce them to must have 'earned credibility', and it should be done with a stated rationale.

9. Organise a discovery session. Invite your client to present to your firm on their business and challenges. Assemble a diverse team to listen and then brainstorm solutions and consider contacts that may be able to help. Just remember, whatever you do, don't charge for this service.

10. Look at changes in your client's business. Consider people you know who may be able to help them through the change. Good times to get involved could be if they're scaling up or down, making changes to the senior leadership team, responding to regulatory change, responding to changes in their sector.

11. Look at changes in their other advisers. It can be a great time to make yourself known when one of their adviser firms has gone through changes recently (ie it's grown, acquired another firm or key partners have left).

12. Analyse your client's competitors. Clients often love it when you have an insight into how a competitor is dealing with the same challenges they face. Of course, be sensitive here. Never breach your confidentiality obligations.

TO WIN MORE WORK FROM YOUR FIRM

On top of these 12 ideas, I've recently seen 6 different ways professionals have been leveraging their colleagues and internal resources to win more work for everyone...

13. Explore your joint client base. Look for clients they serve who have the same features as yours. Cross-referrals work between those who have similar client bases but provide different kinds of advice.

14. Look for market adjacencies. Identify clients from similar sectors. Cross-referrals also work where there are clients from similar fields but different jurisdictions or who operate in different parts of the value chain (a *Customer Value Chain Analysis* is a very useful tool employed by BD & Sales specialists).

15. Work in pairs or form a team. This could be a practice or sector-focused team. Together you should arrange to cross-refer work and take on clients as a unit.



16. Look for shared interests. Clients often like to work with people to similar interests to themselves. So if you love cycling, sailing or Shakespeare, and a colleague's client does too, then there's an immediate fit.

WANT MORE?

There are 16 different ideas for getting more work out of your existing client and internal networks. Sure, not everyone will work in every situation hopefully there's enough inspiration in there for you to get started.

And, if you'd like really ramp up your referrals and develop a blueprint for winning new work, email Sue-Ella at sueella@prodonovich.com or get in touch through our website www.prodonovich.com/contact

FURTHER READING

1. Mascarenhas O, Kesavan R & Bernacchi M (2004) *Customer Value Chain Involvement for Co-Creating Customer Delight*. Journal of Consumer Marketing, Vol 21, Iss 7, 486-496
2. [How To Get Someone to Introduce Their Clients to you.](#)
3. [What the 'Best Lawyers Do:44 Ideas from General Counsel](#) (useful for any professional).
4. [25 Ways Corporate Counsel view Firm Marketing](#) .

Sue-Ella is the Principal of Prodonovich Advisory, a business dedicated to helping professional services firms sharpen their business development practices, and attract and retain good clients.

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