



# WHY COLLABORATION EATS CROSS-SELLING FOR BREAKFAST

**By Sue-Ella Prodonovich**

Anyone who's read my articles for any length of time will be aware of [my acute contempt for cross-selling](#). But that doesn't mean you shouldn't be servicing your clients by joining with your firm's other sections, areas or practice groups; far from it.

The way you should do this, though, is by collaborating: or working together to receive a mutual benefit. Because you're joining forces to better service a client - rather than simply spruiking the services of a colleague with whom you may actually have done very little common work - it's a much more effective way of winning work and building a sustainable business.

With that in mind, here's my guide to how professional services firms can collaborate effectively, or as I like to call it: "Why Collaboration Eats Cross-Selling for Breakfast".

## 1. DEFINE COLLABORATION

First of all, it pays to remember that collaboration means different things to different people. So before you can begin collaborating, you need to come to a common understanding of what it means within your firm.

Are you looking for a best practice approach to client-centred service - one that draws in all parts of your firm and gets them working towards a common goal? Or will it be a cross-firm way to solve major problems and streamline practice groups? Or maybe you want to come together to take an agile approach to the way you build and manage cross-practice teams.

Collaboration could mean bringing together a group of experts within your firm to solve a client's problems by looking at them through different lenses. It could mean taking a broader team-based approach to first meetings and scoping matters.

Or it could even mean collaborating with external experts to provide more diversity when it comes to exploring scenarios and ideas.

So define what it means to you and what you hope to achieve before you set about working out a way to achieve it.

## 2. IDENTIFY YOUR OWN BEHAVIOURS

Collaborating may be about knowing what makes others tick. But before that can happen, we first need to know ourselves.

Dr. Heidi K. Gardner's research identified seven behavioural dimensions to help professionals gain awareness of their behavioural tendencies, understand their team-mates, and turn these into catalysts for collaboration. From measures of inherent levels of trust in others ('Wary' to 'Trusting' scale) to your approach to risk (are you a 'Risk Spotter' or a 'Risk Seeker?').

So your first step in collaboration is knowing the range of personal styles you're working with and matching your approach to suit. And the good news is there's an easy psychometric tool to help (in the same way tools like Myers-Briggs have helped many professionals).

## 3. SHINE A LIGHT ON THE FIRM

Now that you know yourself, it's time to get to know the firm - or at least to identify those areas in which you really excel. Build a catalogue of concrete examples showing aspirational behaviours and successful outcomes. In doing so, you'll create a shared narrative while building knowledge and demonstrating successful outcomes across the firm.

Here's three ways to do this...

### A. Use Case Studies

Uncover and showcase your firm's 'hero' stories. These should cover the arc of the relationship with the client by including:

- background on the client relationship
- what triggered a collaborative approach - was it by accident or design?
- details of how people collaborated and what brought them together
- the surprises or new insights they discovered, and
- the outcome.

### B. Uncover The Client's Voice

Interview clients about their views and experiences with your firm. When you do, Dr. Gardner recommends you "use a systematic, open-ended technique that involves them identifying and analysing specific situations when they were (or weren't) served in a cross-silo way by your firm and the particular results."

Dr. Gardner says that merely asking a client their general opinions about collaboration is unlikely to reveal deep insights. She also notes that it will “almost certainly [be] riddled with biases (recall, confirmation, etc.)”.

Instead, she suggests you should ask the client for concrete examples and give them notice of this before any interview so they’ll have time to meet your request.

### C. Use Financial Evidence

Money talks. Few things are more compelling than illustrating the upside of collaboration in financial terms. So, where you can, try to demonstrate the benefits of collaboration numerically. For example, compare the loyalty, reference value, revenue or margins your firm generates from clients using multiple services with those using just a single service.

## 4. BREAK DOWN THE BARRIERS

In any professional services firm, there will often - ok, always - be barriers to collaboration. Here are some of the more common ones.

- **Incentives and KPIs.** Often the way a firm compensates its fee earners gets in the way of collaboration because it encourages them to act as lone wolves at the expense of the pack.
- **Knowledge of the firm’s offerings.** Sometimes the people within a firm - even the senior ones - don’t really know who does what, which clients people serve, how they win work or even their specialist capabilities. This kind of patchy understanding of the firm’s offerings can be a particular issue in firms with dispersed offices or those that have grown through practice acquisitions.
- **Competence trust.** Professionals are often perfectionists who feel that nobody can do the job quite as well as they can. Sometimes that’s true; often, it’s not. This doesn’t just include technical skills but also extends to managing client relationships.
- **Interpersonal trust.** This is the level of trust people have in others’ characters and intentions. A lack of interpersonal trust is often part and parcel of unfamiliarity. Professionals can be suspicious of new hires or new service teams until they get to know them and understand what makes them tick. And that takes time, which brings me to the next point ...
- **Lack of time and inefficiency of collaboration.** This can be especially true when it’s combined with the logistical challenges of working across time zones or different locations. It’s also a feature of firms where information is siloed or where people are left to do their own research without having to share it.
- **Business development deficiencies.** Perhaps your people just aren’t that skilled at identifying and following through on client opportunities. The good news is that this is something that willing professionals can be trained in.

## 5. BUILD COLLABORATION INTO YOUR ECOSYSTEM

Your ecosystem extends beyond your firm and into other companies, including consultants, clients and other experts. You can also embed collaboration into your relationships with each of these groups to really gain an advantage. It's a great way to engage the experts you regularly brief when tricky problems arise, senior alumni, or the referrers who know your client or industry sector.

The concept of collaborating with partners outside your firm isn't really new. Japanese companies have had [keiretsu](#) networks for a long time. By building a similar ecosystem of collaboration, you'll add diverse views to your thinking, give yourself the opportunity to differentiate yourself from rivals or generate cost advantages, [according to Mark R. Kramer and Marc. W.Pfitzer.](#)

Either way, it's a win/win for you and your clients.

In short, collaboration can be the key to propelling your business forward and gaining a bigger piece of the pie for all your practice groups. Best of all, it does this in ways that genuinely benefit the client - something that can't always be said for cross-selling.

### HEIDI IN THE HOUSE

Dr. Gardner will be visiting Australia early in 2023 to launch her new book "[Smarter Collaboration: A New Approach to Breaking Down Barriers and Winning Work,](#)" which she co-wrote with Ivan Matviak. The book will be available from 1 November 2022. You can arrange bulk orders with Ms. Lea Haggerty at [lea@gardnerandco.com](mailto:lea@gardnerandco.com).

### WANT MORE?

If you'd like to know more about the collaboration profile of your professionals and building a culture of collaboration in your firm, get in touch.

Also, for the latest research, news, and insights on collaboration, [sign up for the new Smarter Collaboration Insights newsletter.](#)

**Sue-Ella Prodonovich is an Accredited Partner in Gardner & Co.'s 'Smart Collaboration Accelerator'™ tools.**

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**Sue-Ella is the Principal of [Prodonovich Advisory](#), a business dedicated to helping professional services practices sharpen their business development practices, attract and retain clients and become more profitable.**

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