



## **CROSS-SELLING TO EXISTING CLIENTS CHECKLIST TEMPLATE**

- ☒ Cross-selling Checklist
- ☐ Identify the client.
- ☐ Identify the responsible lawyer in your Firm.
- ☐ Research what services you or your Firm currently offer to this client.
- ☐ From your research, list what other services your Firm may provide for this client.
- ☐ Inventory what steps are being taken to cross-sell the Firm's services to this client at present.
- ☐ Find out what other law firms are working with the client.
- ☐ Gather the names of the decision-makers and key influencers at the client company.
- ☐ Arrange an internal meeting with the group of working attorneys to understand the client's recent needs.
- ☐ Arrange for the responsible attorney to meet with the client.
- ☐ Define next steps, responsibilities and deadlines after the client meeting.