



Trust Matters Blog



Cross Selling: Part 3 of 3 – How to Get It Right

November 3, 2014 / 2 Comments / in Increasing Sales, Sales / by Charles H. Green

This is part 3 of a three-part series. If your organization offers multiple service offerings, you may find this series of interest.

[Part 1 – What's at Stake \[http://trustedadvisor.com/trustmatters/cross-selling-part-1-3-whats-stake\]](http://trustedadvisor.com/trustmatters/cross-selling-part-1-3-whats-stake)

[Part 2 – What Goes Wrong \[http://trustedadvisor.com/trustmatters/cross-selling-part-2-3-goes-wrong\]](http://trustedadvisor.com/trustmatters/cross-selling-part-2-3-goes-wrong)

Part 3 – How to Get it Right

In Part 1 I said that cross-selling was the single biggest growth opportunity for sales. In Part 2 I listed six ways cross-selling efforts go wrong. Let's now talk about getting it right.

Good cross-selling boils down to One Core Concept: the scarce resource is not content, it's relationship.

Most sellers view cross-selling as matching up an internal content expert with a potential buyer on the client side. This typically has bad consequences. It plays out in "the business card scenario."

The Business Card Scenario

Picture this conversation:

Seller (Bob): Josephine, in our work with you at XYZ, we've noticed that there are some widget-related issues. If you like, we've got some people who are experts in widgetry – I'd be happy to introduce you to Bill. Here's his business

card.

Buyer (Josephine): Thanks Bob, I'll keep that in mind. Let me think about it.

Put yourself in Josephine's place. She is being asked to take several propositions on faith – to trust Bob. First, she's being asked to trust that Bob (the seller) is competent to assess an issue of widgetry (and he's probably not). Second, that Bob is competent to recommend Bill. Third, that this fellow Bill is himself competent at widgetry and would understand it in the context of Josephine's business.

That's a lot to ask! Unless Bob already has a superb relationship with Josephine, he has just asked her to 'trust me' without giving her any specific reason to do so.

Meanwhile, back at the office, Bob meets Bill, his firm's internal expert: it sounds like this.

Seller (Bob): Bill, I gave your business card to Josephine, a buyer at our XYZ client. I think they've got some widget issues you could be great at.

Expert (Bill): Great, I'll look forward to her call.

Which call, of course, frequently never comes. Funny how that works.

Now put yourself in Bill's place. You're being asked by Bob to trust several propositions as well. First, that Bob knows enough about widgetry to have successfully identified a widget issue. Second, that Bob has appropriately and fairly described you and your capabilities (and hasn't underpriced you!). Third, that Josephine is competent on issues of widgetry. And fourth, that Josephine actually wants to talk to you.

In the Business Card scenario, Bob has successfully drawn down on his trust relationship with both his client and his internal expert, asking them in seven distinct ways to trust him. And, asking people to "[trust me \[https://www.youtube.com/watch?v=ouE_xWeqspgI\]](https://www.youtube.com/watch?v=ouE_xWeqspgI)" is a good way to actually destroy trust.

Notice the baseline assumption in the Business Card scenario. It assumes that the critical scarce resource is expertise in the area of widgetry. 'If only we could get the widget expert in touch with the owner of the widget problem, all will be well.' That is the operative assumption – and it is false.

Three Steps to the Real Issue

The real scarce resource in cross-selling is not matching up expertise with problems – it is ensuring the continued strength of the relationship such that it can survive the introduction of a third person. Here's how it's done, from the point of view of Bob, the seller.

Step 1a. Jointly refine the problem definition. Bob (the relationship owner) does not have to be an expert in widgetry; all he has to know is enough about widgets to intelligently define the business issue. The client knows Bob is not a subject matter expert and is OK with that – but wants to know that Bob "gets" the business case.

Step 1b. Re-affirm the client relationship. Bob discusses with Josephine (the client) what an outside expert like Bill might bring to the game. Bob assures Josephine that he will be at the first meeting, and continually available to ensure the hand off is being done well.

Step 2a. Ask the expert to make you just smart enough. Again, Bob does not have to be an expert in widgetry – he just needs to know enough to ask the right questions.

Step 2b. Reaffirm the internal relationship. Bob must assure Bill that he will get him whatever information or perspective he needs before meeting with Josephine, and that Bob will be at the first meeting, and continually available thereafter.

Step 3. Iterate as necessary. Bob must go back and forth between Josephine and Bill to ensure that each is comfortable about the problem definition, expectations, and that Bob will continue to play the same trusted advisor role he played with each client prior to this meeting.

Thinking Right about Cross-Selling

Bob thought his job was to match a technical need. And so he abdicated the responsibility for framing and owning the problem, and for making both Bill and Josephine feel his commitment to their relationship.

We too often think of cross-selling as like a data query – trying to guess at a solution to a problem from afar. But that's hard – like throwing darts with mittens. You're not an expert in either the content or its application to the business.

Instead, think of cross-selling as like setting up friends on a date. The date may or may not ultimately work out, but you want to make the process as comfortable as possible for each party. You want each of them to:

- know something about each other ahead of time
- have a basis for conversation so they can hit the ground running
- feel an easy, legitimate 'out' in case the fit isn't right
- know that you are committed to your pre-existing relationships with them regardless of how this particular connection works out.

If you handle cross-selling in this manner, you will not need to draw down on trust. In fact, you will increase the amount of trust that each party has in you – because you have placed the relationship ahead of the solution or the sale.

Done right, cross-selling not only works, it builds trust in the process.

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