



Breakout #1: Collective Company: Scalable Cross-Selling in Modern Client Management

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Cross-serving vs. cross-selling

Cross-serving starts with your *client's priorities*;

Cross-selling starts with the *firm's wants*

Look for the **intersection** of your client's needs with *your firm's capabilities*

Not: “Want to meet our tax guy?”

Requires firm investment for folks to “**know the client**” *and* “**know the firm**”