LATIN BRAINS
STRATEGY + GROWTH

— POSITION PAPER · Q2 2026

Why Cross-Selling Initiatives Die in Twelve Months

And the fourteen decisions that prevent it.

FOR FULL-SERVICE LAW FIRMS IN LATIN AMERICA — WRITTEN FOR MANAGING PARTNERS, PRACTICE HEADS, AND PARTNERS BUILDING THEIR OWN BOOK.

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The Frame

OUR HYPOTHESIS

Full-service law firms in Latin America are leaving meaningful revenue on the table — work their existing clients already buy, but buy from other firms. **The cause is not strategy. It is architecture.** Cross-practice work fails because the firm cannot see itself: information about clients does not flow between practices, coordination is informal, and partners frame the conversation as a sale when it should be framed as a service.

Solve information, coordination, and framing — and the cross-practice work happens on its own.

Most cross-selling initiatives in full-service Latin American firms fail in the same way. The Managing Partner declares cross-selling a strategic priority. Committees are formed. Targets are set. Partners are told to "sell across the firm."

Nothing happens.

Not because partners are unwilling. **Because the request makes no sense.** A partner cannot cross-sell a service when they do not know which firm-wide clients exist, how to approach the lead partner who owns the relationship, or what to say to the client that doesn't sound like a pitch.

These fourteen decisions assume that distinction matters. They are ordered the way the work has to happen — and **skipping the order is the most common reason cross-selling initiatives die within twelve months.**

SUPPORTING RESEARCH

Heidi Gardner's research at Harvard Law School (Smart Collaboration, HBS Press 2017) finds that firms with strong cross-practice collaboration generate 5–12% revenue uplift over peers, and that clients engaged in three or more practices retain at rates above 95%. The numbers come from US and UK markets, but the architectural mechanism — that collaboration depends on information infrastructure, not exhortation — applies regardless of geography.

— CONTENTS

What you will find in this paper.

DIAGNOSTIC · WHERE YOUR FIRM SITS TODAY

The Cross-Practice Activation Quadrant

↑ **COORDINATION ARCHITECTURE** HIGH AT TOP · LOW AT BOTTOM

TRIBAL *Partners coordinate, but no one knows who the firm's clients actually are.*	**ACTIVATED** *The fourteen decisions in this paper are in place.*
PRETENDING *Cross-selling is a stated priority. Operationally, it does not exist.*	**ANECDOTAL** *Information exists, but the protocol for using it does not.*

← LOW **INFORMATION ARCHITECTURE** → HIGH →

Most LatAm firms locate themselves in **Pretending** *or* **Anecdotal** *— and operate as if they were in* **Activated***. The gap between perception and architecture is where the revenue is lost.*

— HOW TO READ THIS DOCUMENT

Two audiences, two paths.

The fourteen decisions in this paper assume different readers will act on different things. If you are reading this as a Managing Partner, the cultural precondition is yours alone — and you will want to read the entire document. If you are a Practice Head or BD Director, the operational layer is where the work is done.

AUDIENCE 01

Managing Partners

RECS 1 — 14

Block 01 — Cultural precondition. Decisions only you can make. Then read everything else.

AUDIENCE 02

Practice Heads & BD Directors

RECS 6 — 14

Blocks 02 and 03. The operational architecture, account by account.

SECTION 02 · BLOCK 01

The Cultural Precondition

Five decisions only the Managing Partner can make. Without these, nothing in the operational layer survives the second quarter.

01 · Start with four questions

Before any framework, any committee, any initiative — the Managing Partner has to answer four questions, honestly, on paper:

1. Can any partner in the firm name, today, the firm's top twenty clients by revenue — and the lead partner on each?
2. When a partner finishes a mandate, is there a documented protocol for what they do next with the client — or is the next call left to instinct?
3. Is there a single partner in the firm who has personally referred a $250K+ mandate to a colleague in another practice in the last twelve months — and can name the credit they received for it?
4. If the firm's most institutionally connected partner left tomorrow, would the clients stay?

The number of *yes* answers is the firm's actual position on the Activation Quadrant. Most MPs answer no to three of the four. Almost none answer no out loud.

> *The honesty of these four answers is the precondition. Everything below assumes the MP has had the courage to write them down.*

02 · Build the system that lets the firm see itself

Every architecture in this paper assumes two things that are not true in most LatAm firms.

First, that information about the client flows. When a partner hears something material from a client — an expansion plan, a leadership change, a new mandate brewing — that information typically lives only in that partner's head. It does not reach the colleagues in other practices who would act on it. Without a place where relationship intelligence is captured in writing, every downstream architecture in this paper breaks: the compensation system cannot reward referrals it cannot see, and no written hypothesis can be built on information that was never written down. Most firms have a CRM. Most firms use it as a billing tool. The fix is not buying a new system. It is making whichever system you have the place where *relationship intelligence actually lives* — read by partners, updated by partners, owned by partners.

Second, that the firm has a single taxonomy of practices. Most firms have ambiguity that looks harmless and is not. Is Corporate the same as M&A? Is Project Finance inside Banking & Finance or separate? Is Capital Markets debt only, equity only, or both? When the firm cannot answer these questions consistently, no Account Map can be built, no heatmap can be read, no quarterly review can compare apples to apples.

> *The information system and the practice taxonomy are not back-office work. They are the operating system of cross-practice activation. Everything below assumes both are working.*

03 · Audit the gap between seniors and laterals

The cross-selling problem looks identical on the surface. Underneath, it has different causes by partner population — and the fix for each is different.

The senior partners who built the firm typically cross-sell well within an inner circle of partners they trust personally. They do not cross-sell as readily to partners they have not worked with directly — and in firms that have hired meaningfully in the last five years, that circle is narrower than the partnership realizes. The fix is structural visibility, not motivation.

The lateral partners hired in the last 24–60 months typically know how to cross-sell — they did it at their previous firm. What they don't know is who to approach, who owns which client, and whether the firm's culture rewards or punishes the introduction. The fix is protocol, not training.

The recently-named partners — promoted from within in the last 36 months — face a different problem again. They have technical credibility but not yet a client portfolio they can claim as their own. For them, cross-practice activation is the fastest legitimate path to origination, but only if the firm makes it visible which clients are open to them and which are still owned by a senior.

Most firms address all three with the same intervention and none of the problems move. The audit names each population separately.

04 · Move to the institutional client model

Most LatAm firms operate, in practice, as a federation of sole proprietorships sharing a building. The relationship partner owns the client. The firm pays the rent.

The institutional client model says the opposite: **the client is a relationship of the firm, not of a single partner.** The relationship partner is the steward of that relationship — not its owner. In practice this means the firm protects the client from the consequences of any one partner's departure: continuity is built in, not improvised after the fact.

This is not a philosophical claim. It is an operational one. The institutional client model means three things, none of them optional:

1. Every priority client has a documented relationship map — who knows whom, what's been pitched, what's been won and lost, what's adjacent and unworked. Updated quarterly. Visible to every partner who serves the client.
2. The compensation system does not punish the partner who introduces another partner to the client. It rewards it.
3. When the relationship partner leaves, the client does not — because the client knows three other partners by name. Not because the firm "fought to keep them," but because the cross-practice work was real for two years before the departure.

> *The Managing Partner who declares cross-selling a priority without first moving to the institutional client model is asking partners to take a risk the institution has not earned the right to ask.*

05 · Make this the MP agenda, not a BD initiative

The moment cross-practice activation is delegated entirely to the Business Development function, the cultural signal to the partnership is clear: *this matters less than billing*.

Partners are sophisticated readers of institutional signals. When the MP raises a topic in a partners' meeting, it gets attention. When BD raises the same topic in a Tuesday workshop, it gets nodding. The content is identical. The cultural weight is not.

The fix is mechanical, not motivational: **cross-practice activation has to be a standing item on the MP's monthly partner communication.** Three minutes. Named accounts. Named partners. Named wins and named losses. Repeated.

BD does the execution. The MP carries the cultural weight. Switching the two is the most common reason the initiative is "absorbed into BAU" — business as usual — by month nine.

SECTION 03 · BLOCK 02

The Partner Operating System

Four decisions that turn the cultural precondition into something partners can act on: client visibility, an inter-practice protocol, a shared vocabulary, and a compensation structure that rewards the work.

06 · Client visibility before client strategy

The single most common reason partners do not cross-sell is the simplest one: **they do not know which clients are already the firm's clients.**

A capital markets partner has lunch with a CFO. The CFO mentions an upcoming acquisition. The partner thinks: *I should refer this to our M&A team.* Then they don't — because they don't know if M&A has already pitched this client, who the relationship partner is, or whether the introduction would be welcomed or resented. By the time they check, it's three weeks later. The conversation has moved on. The opportunity is gone.

Most firms try to solve this with a CRM. CRMs solve a different problem. What partners need is a **two-page firm-wide relationship sheet**, updated monthly, that any partner can read in five minutes: top 50 clients, lead partner, last three mandates, what's adjacent and unworked.

Not searchable. Not interactive. Readable. The friction has to be lower than the partner's threshold for asking the question.

07 · The 90-second protocol

When a partner sees an adjacent opportunity at a colleague's client, they have to do one of two things — fast: **ask permission, or claim territory.** Most partners do neither, because the firm has not made it clear which is expected.

The 90-second protocol is exactly what the name says: a structured 90-second conversation, partner-to-partner, that resolves the question:

— Here's what I saw at your client.

— Here's the hypothesis about what they need from my practice.

— Do you want me to follow up directly, or do you want to make the introduction?

The protocol takes 90 seconds because it has been pre-agreed. There is no negotiation about credit, no debate about strategy, no email thread.

08 · Stop using the word "selling." Start using the word "helping."

Clients hate to be cross-sold. They feel it being done to them. Partners hate the word "selling" applied to themselves — they became partners to advise, not to sell.

So the reframe matters. When you ask a partner to "cross-sell to a client," they hear: *find a reason to pitch them something they didn't ask for*. When you ask them to "help a client see an adjacency they may not have framed yet," they hear: *do what I already do for clients I've worked with for years*.

Same behavior. Different word. The language is what unlocks it.

> *The firms that succeed remove "selling" from their internal vocabulary entirely. They are not pretending. They are naming what the work actually is.*

09 · Compensation as architecture, not as message

Every firm we have looked at says it rewards collaboration. Almost none of them do, in any way a partner can name without checking the compensation memo.

The partner who refers a meaningful mandate to a colleague and receives nothing back will refer it once. Maybe twice. Then they will stop. Not because they don't want the firm to grow. **Because the firm's compensation system has told them, in operational terms, that the referral does not count as work.**

Most firms try to fix this with culture. They publish values statements. They give "collaboration awards." None of it survives the December conversation where the partner's compensation is decided against numbers that do not include the referrals they made.

The fix is mechanical, not motivational. The cleanest model we have seen — used by leading US and UK firms — splits every matter into **three explicit credits**:

20–25%	**Origination Credit** To the partner who brought the client to the firm. Paid for the life of the relationship — not just the year they introduced it.
10–15%	**Matter Manager Credit** THE ENGINE To the partner who stewards the account — incorporating more practices, supervising delivery, holding the relationship. **This is the credit that makes cross-practice activation rational.** It converts every new practice the relationship partner brings in from a favor into recurring passive income.
60–70%	**Worker Credit** To the partner and team executing the hours. The work itself is still where most of the compensation flows.

> *The Matter Manager credit is what turns the relationship partner from a gatekeeper into an orchestrator. Without it, every referral is a favor — and favors are finite.*

SAMPLE · RECOMMENDATION 06 IN PRACTICE

What client visibility actually looks like

A firm-level heatmap of the top twenty accounts against the firm's practices. Each empty cell is a question. Each cluster of empty cells is the next conversation.

SAMPLE · ANONYMIZED CLIENT WORK

Service Asymmetry Heatmap · Latin Brains for a top-tier LatAm firm

— FIRM CROSS-PRACTICE INTELLIGENCE

TOP 12 ACCOUNTS · FY 2025

SERVICE ASYMMETRY MATRIX

Where the revenue is. Where it isn't.

Twelve priority accounts × seven practices. Each cell is the firm's annual revenue from that practice at that client. **Empty cells next to filled cells are the opportunity** — work that the client buys, but not from us.

REVENUE SCALE: $0 · <$100K · $100–300K · $300K–1M · $1–2M · $2M+

ACCOUNT	SECTOR	M&A	CAPITAL MKTS	BANKING & FINANCE	TAX	LITIGATION	LABOR	REG & COMPLIANCE	TOTAL
Andes Energía	ENERGY	$2.8M	$180K		$60K				**$3.0M**
Banco Costanera	BANKING	$220K	$2.4M	$1.6M	$190K			$70K	**$4.5M**
Cervecera del Plata	FOOD & BEV				$540K	$1.3M	$420K	$160K	**$2.4M**
Constructora Pacífico	INFRA	$610K		$1.4M	$150K	$2.1M	$240K		**$4.5M**
Distribuidora Sur	RETAIL			$140K	$380K	$210K	$1.1M		**$1.8M**
Grupo Cordillera	CONGLOMERATE	$1.5M	$680K	$510K	$1.2M	$430K	$220K	$180K	**$4.7M**
Minera Atacama	MINING	$80K			$470K	$3.1M	$260K	$1.4M	**$5.3M**
Naviera Austral	LOGISTICS			$170K	$130K	$1.1M			**$1.4M**
Petroquímica del Norte	ENERGY	$590K	$210K		$1.3M			$340K	**$2.4M**
Salud Integral	HEALTHCARE				$120K	$390K	$580K	$2.6M	**$3.7M**
Telco Latam	TELECOM	$1.3M	$240K		$650K	$190K		$1.5M	**$3.9M**
Vinos Andinos	AGRIBUSINESS	$160K			$1.1M		$510K	$220K	**$2.0M**

READOUT

Three accounts (**Andes Energía**, **Cervecera del Plata**, **Naviera Austral**) have *five or more practices at zero or token revenue*. Each is a single relationship partner. Each is recurring work the firm is leaving on the table. The first three quarterly hypotheses write themselves.

LATIN BRAINS · INTERNAL USE

SOURCE: FIRM BILLING DATA FY 2025 · 12 OF 20 PRIORITY ACCOUNTS SHOWN

SECTION 04 · BLOCK 03

Building the architecture, account by account

Five decisions that turn the cultural precondition and partner enablement into an operational system, account by account.

10 · Define the accounts — finite, deliberate, prioritized

Every firm we have seen with a "key client program" has the same problem: **the list is too long.** Forty accounts. Sixty. We have seen one hundred and twenty. The list gets built by asking each partner to nominate their most important clients, and the natural outcome is that everything ends up on it. At that length, the list stops being a list. It becomes a directory.

The finite list is exactly what the name says: **no more than thirty accounts, firm-wide, reviewed quarterly.**

The accounts are not chosen by acclamation. They are chosen against a small set of explicit criteria — a decision matrix the Practice Heads work through together:

- **Strategic fit** — where the firm has decided to grow, by sector and by practice. Accounts that sit inside that growth corridor get weight.
- **Ease of win** — the client's openness, the depth of the existing relationship, the realism of the adjacency hypothesis.
- **Revenue potential** — both the current spend and the credible upside in adjacent practices over a 24-month horizon.
- **Cross-practice surface** — accounts where the firm already touches three or more practices warrant different treatment than accounts where it touches one.

Once the list is set, the firm needs a way to *see* it. The heatmap earlier in this paper is what that looks like in practice — the top accounts against the firm's practices, with the empty cells made visible. **Each empty cell next to a filled one is the next conversation.**

> *Firms that succeed at cross-practice activation do not have longer lists than firms that fail. They have shorter lists, chosen deliberately, that they actually work.*

11 · Give each account an owner

A list without owners is a directory. The thirty accounts on the finite list need **a named owner and a named secondary partner — from a different practice — for each account.**

The owner is not the partner who happens to have billed the most hours. The owner is the partner the firm has decided is responsible for the institutional relationship: keeping the relationship map current, calling the quarterly review, holding the written hypothesis for the account, and brokering introductions to other practices.

The secondary partner is the structural answer to single-partner risk. They know the client by name. They have been introduced. They are positioned to step in if the primary partner leaves — and to bring in their practice when the moment is right.

This is the operational layer of the institutional client model in Rec 04. Without named owners, the model is a philosophy. With them, it becomes the operating system of the account.

> *If the relationship partner left tomorrow and the secondary partner could not name the client's last three mandates, the firm does not yet own the account.*

12 · Study the account — one written hypothesis per client

The most powerful operational discipline we have seen is also the simplest: **for every account on the finite list, the firm holds one written hypothesis about what the client needs next.**

One paragraph. One page maximum. Built in four steps:

1. **Understand the firm.** Strategy, challenges, leadership change, sector dynamics, regulatory pressure. Read the client's annual report and the last three quarters of press, with the right lens.
2. **Map the full possible service set.** List every practice the firm could meaningfully deliver for this client over the next 24 months — not just the obvious ones.
3. **Choose one by impact and urgency.** The single adjacency that is most pressing for the client and most credible for the firm to lead with. Pick deliberately. Resist the temptation to pitch the whole catalog.
4. **Write the hypothesis as a memo.** A short, observation-led memo framing what the firm believes the client is about to face — and what the firm is positioned to do about it. The conversation with the client starts from that memo, not from a meeting request.

The hypothesis is wrong about half the time. That doesn't matter. What matters is that the firm has done the thinking before the opportunity appears, not after.

> *Firms that maintain written hypotheses for their top accounts have shorter, sharper client conversations. The hypothesis does the work the meeting used to do.*

SAMPLE · RECOMMENDATION 12 IN PRACTICE

What an account-level hypothesis looks like

An Opportunity Matrix integrates seven practices across two dimensions — urgency and fee potential. The result is one page that the entire account team can read in five minutes.

SAMPLE · ANONYMIZED CLIENT WORK

Account Map · Latin Brains for a top-tier Chilean firm

ACCOUNT STRATEGIC ANALYSIS

LATAM AIRLINES GROUP

Opportunity Matrix

This table integrates the seven practices across two independent dimensions. **Urgency** answers when to act. **Fee Potential** answers how much work is generated if activated.

URGENCY

- **High** — Active window, action in weeks
- ◆ **Medium** — Likely mandate in 3–6 months
- ● **Horizon** — 6–18 months, enter today to win tomorrow

FEE POTENTIAL

- ● **High** — Extensive, multi-practice or recurring program
- ● **Mid** — Significant but bounded mandate
- ● **Low→Mid** — Point-in-time today, grows if client advances

PRACTICE	URGENCY	FEE POTENTIAL	WHAT COULD BE IN PLAY	ENTRY ANGLE	FIRST ACTION
Capital Markets + M&A	High	● **High** Pending secondaries. Post lock-up could be the largest op. of the year.	Sixth Street and SVP positioned. Delta/Qatar/Cueto lock-ups Nov. 2026.	Post-lock-up scenario analysis before June 2026.	GC meeting — scenario analysis
Regulatory + Competition	High	● **Mid** High value per hour, bounded in volume.	4 active FNE/TDLC proceedings. Abra-Sky window closing Q2-Q3 2026.	Evaluate third-party intervention in Abra-Sky before FNE closes.	Memo to GC on Abra-Sky
Labor	◆ Medium	● **Mid** Chile defense + regional Lex Mundi coordination = sustained volume.	Active anti-union claim. Open agreements in Peru and Ecuador.	Coordinate union strategy Chile-Peru-Colombia.	Memo GC + VP HR
Litigation	◆ Medium	● **Low→Mid** Holding-level coordination role — bounded today.	Voepass arbitration active. TDLC monitoring. Possible CADE Brazil.	Holding-level defense coordination on Voepass.	Review of codeshare contracts
Expansion Contracts	● Horizon	● **High** USD 420M+ in active contracts. Lex Mundi coordination in European jurisdictions.	Viasat, Recaro, BNDES contracts without documented local advisory.	Request access to Viasat and Recaro contracts.	Request access from GC
Data + Privacy	● Horizon	● **High** Compliance for 51M members across 5 countries is months of work.	Chilean Law 21.719 in force Dec. 2026. Brazilian LGPD active. Viasat WiFi creates new flows.	Law 21.719 readiness diagnostic focused on LATAM Pass and Viasat.	Gap analysis proposal to GC
SAF + Environmental	● Horizon	● **Low→Mid** Grows to Mid when CORSIA becomes mandatory in 2027.	Bio-D agreement with certification risk. CORSIA mandatory 2027.	Review Bio-D contracts — technical, specific entry.	Request access to Bio-D agreements

LATIN BRAINS · INTERNAL USE

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13 · Knock with an insight, not a cold email

When the firm has done the work in Rec 12 and is ready to bring the hypothesis to the client, the temptation is to schedule a meeting. Send an email. Ask for thirty minutes.

That move fails for the same reason most cold outreach fails: **it asks for the client's time without offering anything specific in return.** The client says no, or delays, or accepts politely and forgets the meeting ever happened.

The right move is structurally different: a **one-to-two page written memo** naming a specific observation about the client's situation and framing a hypothesis about a problem the firm can help solve.

Internal first — all partners involved align on a single coherent reading. Then to the client. Not as a pitch. *As an external read on something the client may not yet have framed.*

> *Cold outreach asks for the client's time. An insight memo offers the client something they did not have.*

14 · Quarterly cadence and trigger monitoring

The cross-selling initiative that dies in month eleven looks the same in every firm. Month one: MP announces it. Energy is high. Month three: committee meets. Month nine: two or three early wins get circulated internally. Month twelve: the initiative is "absorbed into BAU" — business as usual.

This is a structural problem, not a motivational one. Cross-practice activation cannot be a project, because projects end. It has to be a **permanent operating cadence** — like billing, like ranking submissions, like the annual offsite. Something that happens on the calendar every quarter regardless of who is busy.

The cadence has two parts:

— **The quarterly account review.** For each account on the finite list, the owner and secondary partner sit down for thirty minutes with the BD lead. The written hypothesis gets updated. New mandates get recorded. The next adjacency gets named.

— **Continuous trigger monitoring.** Between reviews, the firm watches the financial press for trigger events at its accounts — physical expansion, digital launch, leadership change, regulatory shift. A short internal newsletter distributes the triggers weekly: which clients moved, what changed, what opens up. The newsletter is what keeps the architecture alive between formal reviews. It is also how partners who do not own the account stay informed about what is happening at it.

> *Treated as a 12-month project, cross-practice activation produces eleven months of results. Treated as quarterly cadence with continuous trigger monitoring, it produces results indefinitely.*

SAMPLE · RECOMMENDATION 13 IN PRACTICE

What an insight memo looks like

When a firm sees a real adjacency at a client, the move is not a meeting request. It is a one-to-two page diagnostic anchored in public numbers.

SAMPLE · ANONYMIZED CLIENT WORK *Insight Memo · Latin Brains for an international tax partner*

INTERNATIONAL TAX COUNSEL
SÃO PAULO · RIO DE JANEIRO

CLIENT MEMORANDUM
May 5, 2026 · Rio de Janeiro
Privileged & Confidential

TO	**Chief Financial Officer** — Brazilian oil & gas operator
FROM	Tax Partner · São Paulo office
RE	MP 1.340/2026 — A diagnostic of how the new export tax sits inside the company's 2026 plan

A diagnostic on how the new export tax interacts with the company's 2026 production ramp.

Prepared as a starting point for an internal conversation. No conclusions, no urgency — only what we are seeing in the numbers and where the open questions sit.

IN PLAIN TERMS — BEFORE THE LEGAL DETAIL

On **March 12, 2026**, Brazil issued a Provisional Measure (MP 1.340/2026) creating a 12% federal tax on every barrel of crude oil exported from the country, effective immediately. Five large operators (Shell, Equinor, TotalEnergies, Repsol Sinopec, Petrogal) challenged the tax in court and won an injunction in early April; the appeals court suspended it two weeks later on procedural grounds. The substantive question — *does the tax respect the constitutional principle that prevents new taxes from being collected immediately* — is still open and will reach the Supreme Court.

The company is paying the tax. It is also, simultaneously, ramping production from ~106 kbpd in 2025 toward the 200 kbpd target for 2026. **This memo is that conversation, in writing.**

WHAT WE ARE SEEING — 2026 ESTIMATE — Built from public company disclosures + EIA forecasts

ESTIMATED EXPORT TAX OUTFLOW — FY 2026

US$ 380–550 M

Equivalent to **R$ 1.9–2.8 billion** at current FX. Even under conservative assumptions, this is the gross outflow under the 12% rate.

VS. 2025 EBITDA

27–40%

2025 adjusted EBITDA was approximately US$ 1.4 B. The tax outflow alone sits in this range as a percentage of last year's earnings power.

NET LEVERAGE

2.3x

Current ratio. The accounting treatment chosen for the tax paid (expense vs. recoverable) materially affects the next quarterly read.

PREPARED BY LATIN BRAINS — STRATEGY + GROWTH
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SECTION 06

The First Ninety Days

A starting roadmap for the Managing Partner who wants to act

The fourteen decisions in this paper are not equally urgent. They are equally *necessary* — but the order in which they are taken determines whether the architecture survives the first six months.

The following is a starting roadmap. It assumes a Managing Partner who has read this paper and decided to act. It is not a project plan. It is the first ninety days — the period in which the work either becomes institutional or quietly returns to being a BD initiative.

PHASE 01 DAYS 1 — 14	Make the precondition visible
REC 01	Answer the four questions on paper. Not in a meeting. Not in conversation. In writing, in your own handwriting if possible.
REC 05	Schedule cross-practice activation as a standing three-minute item on the monthly partners' meeting agenda for the next twelve months.
—	Identify the BD lead who will own the operational layer. They will execute. You will carry the cultural weight.

PHASE 02 DAYS 15 — 45	Build the operational layer
REC 10	Define the finite list. Thirty accounts, firm-wide, agreed by Practice Heads against the decision matrix. Resist the pressure to expand it.
REC 06	Build the two-page relationship sheet for those thirty accounts. Lead partner, last three mandates, what's adjacent and unworked.
REC 03	Run the audit on the gap between senior partners, laterals, and recently-named partners. Name each population separately.
REC 07	Pre-agree the 90-second protocol with the Practice Heads. Test it in the next two weeks before scaling to the partnership.
REC 11	Name a primary and secondary partner for each of the thirty accounts. From different practices. Put it in writing.

PHASE 03 DAYS 46 — 90	Make it durable
REC 12	Write the first hypothesis for each of the thirty accounts. One paragraph per account. Practice Heads draft, partners review, MP reads.
REC 14	Schedule the first quarterly account review for day 90. Place it in the calendar of every partner involved twelve months out. Begin the weekly trigger newsletter.
REC 08	Begin the language shift. The word "selling" leaves the internal vocabulary. The word "helping" enters it. Model it from the top.
REC 09	Open the compensation conversation — to put it on the table for the next cycle.

WHAT COMES AFTER DAY 90

Rec 13 (insight memo) and Rec 04 (institutional client model) are not 90-day decisions. The work in the first ninety days makes them possible. The work after day 90 makes them real.

DEPENDENCY MAP

How the Fourteen Decisions Connect

Each block is a precondition for the next. The architecture works only in this order.

01
Cultural Precondition
MANAGING PARTNER

- 01 Four questions
- 02 Info system & taxonomy
- 03 Senior / lateral / new-partner audit
- 04 Institutional client model
- 05 MP agenda, not BD initiative

What this enables: the operational layer below can be authorized.

→

02
The Partner Operating System
PRACTICE HEADS & BD

- 06 Client visibility
- 07 90-second protocol
- 08 Helping, not selling
- 09 Compensation as architecture

What this enables: partners can act on cross-practice opportunity.

→

03
Building the Architecture Account by Account
MPS & PRACTICE HEADS

- 10 Define the accounts
- 11 Owner per account
- 12 Written hypothesis
- 13 Insight memo, not cold email
- 14 Quarterly cadence & triggers

What this delivers: the architecture becomes durable, account by account.

The path is not optional. Skipping a block does not accelerate the work — it guarantees the work fails.

Block 03 without Block 02 is the firm building infrastructure for partners who cannot use it. Block 02 without Block 01 is an operational layer the partnership has not authorized.

THE AUDIT

An external read on where your firm actually sits.

The fourteen decisions in this paper are not difficult to articulate. They are difficult to see honestly from inside the firm.

> The opportunity is not in finding new leads. **Your top twenty clients already spend money on external counsel that does not come to you.** The empty cells in the firm-wide heatmap are not gaps in your practice mix — they are revenue leaving for competitors. The audit makes those cells visible.

Latin Brains produces a Cross-Practice Activation Audit for law firms that want an external read on where they actually sit — not where they say they sit.

The audit takes four weeks. It produces:

- A confidential 15-page diagnostic anchored in your firm's deal record, ranking trajectory, and lateral movement of the last 24 months.
- A position on the Cross-Practice Activation Quadrant — with the evidence behind it.
- The three decisions, out of the fourteen in this paper, that would move your firm one quadrant in the next twelve months.
- A working session with the Managing Partner and the Practice Heads to validate or correct the read.

If this paper raised questions worth exploring, write to alejandro.massri@latinbrains.com.

— ABOUT LATIN BRAINS

We know the problem from one side. We know the solution from the other.

The problem in this paper comes from current conversations with leading Latin American law firms — managing partners, practice heads, and BD directors who recognize the cross-practice gap but have not found a way to close it. The diagnostic is built from those conversations.

The solution comes from fifteen years of operational work with leading US and UK firms. That is where the architecture in this paper was tested and refined.

SELECTED FIRMS WHOSE BD TEAMS WE CURRENTLY ADVISE

White & Case · Simpson Thacher · Jackson Lewis

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