

NAME \_\_\_\_\_

DATE \_\_\_\_\_

## 2011 Individual Business Development Plan: Corporate/Business

List two of your primary Strengths:

EXAMPLE: numerous referral sources; memberships

- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_

What should you do to take advantage of these?

\_\_\_\_\_

List two of your primary Weaknesses:

EXAMPLE: dislike social events, schedule makes follow-through difficult...

- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_

What will you do to improve upon these?

\_\_\_\_\_

List two primary Opportunities you see in your practice area: EXAMPLE: Obama administration means increased union activity

- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_

What will you do to capitalize on these?

\_\_\_\_\_

List any Threats to your practice area:

EXAMPLE: client acquisitions or management changes; industry regulation or statutory changes; no credit to do deals

- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_

What can you do in response to these?

\_\_\_\_\_

### CURRENT BUSINESS:

How are you currently obtaining most of your work? EXAMPLE: attorney referrals, membership in the ABC Association

\_\_\_\_\_

In what specific situations and for what type of work should friends, colleagues and clients automatically think to contact *you* for help?

EXAMPLE: Sale of a business, new product/line launch, cash flow problems, reduction in force, apparent union organizing activity, etc.

- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_

What situations listed above would you like to focus on developing more of in 2011?

\_\_\_\_\_

What are the primary/best revenue producing projects/matters in which you are currently involved?

Client: \_\_\_\_\_ Nature of work: \_\_\_\_\_

Client: \_\_\_\_\_ Nature of work: \_\_\_\_\_

What trade or community organizations are essential to the house counsel or executives of these clients?

Client: \_\_\_\_\_ Trade organization: \_\_\_\_\_

Client: \_\_\_\_\_ Trade organization: \_\_\_\_\_

Are you active in these trade organizations?  Yes  No

What trade organizations/associations *are you currently active in*? \_\_\_\_\_

\_\_\_\_\_

What trade organizations/associations *would you like to become active in*?

## 2011 ACTION PLAN

Rank your level of interest in the following: 1- "I'd do it", 2- "I might do that", 3- "I Won't do that"

<input type="checkbox"/> Speaking at conferences/seminars <input type="checkbox"/> Writing articles/blog posts/new alerts <input type="checkbox"/> Joining and networking in a trade group <input type="checkbox"/> Taking a leadership position in such a group	<input type="checkbox"/> Teaching targeted CLE or CPE <input type="checkbox"/> Attending targeted industry-related events <input type="checkbox"/> Targeted pro bono or community relations work <input type="checkbox"/> Other (please specify) _____
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For each item you ranked with a "1" list at least two actions you can take, set and calendar a reasonable deadline: EXAMPLE: Join ABC Association, speak at annual meeting of (name of group)

Activity: \_\_\_\_\_

✓ Action: \_\_\_\_\_ Deadline: \_\_\_\_\_

✓ Action: \_\_\_\_\_ Deadline: \_\_\_\_\_

Activity: \_\_\_\_\_

✓ Action: \_\_\_\_\_ Deadline: \_\_\_\_\_

✓ Action: \_\_\_\_\_ Deadline: \_\_\_\_\_

Are there current clients of the firm that you work with which have additional legal needs that you think other lawyers in your firm could be retained for? (List client and new service and we could provide)

Client/New Service: \_\_\_\_\_

Client/New Service: \_\_\_\_\_

Identify two industries, say, meatpacking or software engineering, that interest you and in which you have had cases

✓ \_\_\_\_\_

✓ \_\_\_\_\_

What action will you take to familiarize yourself with and network in these industries? Calendar the deadlines.

✓ Action: \_\_\_\_\_ Deadline: \_\_\_\_\_

✓ Action: \_\_\_\_\_ Deadline: \_\_\_\_\_

Please list two or three prospective clients. List the key person you know there, even if just casually, and the company

✓ \_\_\_\_\_

✓ \_\_\_\_\_

✓ \_\_\_\_\_

What actions will you take toward obtaining them as clients in the next 12 months? Calendar the deadlines.

✓ Action: \_\_\_\_\_ Deadline: \_\_\_\_\_

✓ Action: \_\_\_\_\_ Deadline: \_\_\_\_\_

✓ Action: \_\_\_\_\_ Deadline: \_\_\_\_\_

Identify three referral sources by name, company, industry (i.e., John Doe/Numbers, Inc./public accounting):

✓ \_\_\_\_\_

✓ \_\_\_\_\_

✓ \_\_\_\_\_

What actions will you take to obtain an initial or more referral(s) from each? Calendar your deadlines.

✓ Source/Action: \_\_\_\_\_ Deadline: \_\_\_\_\_

✓ Source/Action: \_\_\_\_\_ Deadline: \_\_\_\_\_

✓ Source/Action: \_\_\_\_\_ Deadline: \_\_\_\_\_

With whom will you discuss this plan as you progress this year? Name: \_\_\_\_\_ and how often? Every \_\_\_\_\_ days. Calendar these updates. How will you reward yourself when key items are completed? \_\_\_\_\_