

NAME _____ DATE _____

2011 Individual Business Development Plan

SELF-REFLECTION:

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

- ✓ _____
- ✓ _____
- ✓ _____

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 activities:

(1 = very interested; 2 = somewhat interested; 3 = no interest)

- _____ Speaking at conferences/seminars
- _____ Writing articles/blog posts/new alerts
- _____ Joining and networking in a trade group
- _____ Taking a leadership position in such a group

- _____ Teaching targeted CLE or CPE
- _____ Attending targeted industry-related events
- _____ Targeted pro bono or community relations work
- _____ Other (please specify) _____

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 the firm could be retained for? (List client and new service we could provide)

Identify two prospective groups of clients (industries or types of businesses) that interest you:

- ✓ _____
- ✓ _____

What actions will you take to better familiarize yourself with these industries?

✓ Action: _____ Deadline: _____

✓ Action: _____ Deadline: _____

Please list two or three prospective clients— people you know of, or only casually know, and their organization

- ✓ _____
- ✓ _____
- ✓ _____

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 (e.g., 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? _____