

ABA
SECTION OF TAXATION
and
SECTION OF REAL PROPERTY, PROBATE AND TRUST LAW
2004 JOINT FALL CLE MEETING
COMMITTEE PROGRAM MATERIAL

Friday, October 1, 2004

“RAINMAKING - A DANCE EVERYONE CAN LEARN”

BUSINESS PLAN

I. Purpose:

Identify the purpose of this planning document and how it relates to firm, department and/or practice group objectives.

II. Productivity Goals

- Billable Hours
- Billed Hours
- Fee Receipts
- Originations
- New Clients
- New Matters

III. Professional Development

List one to three goals below for your professional development (“short lists,” honors, appointments, certifications, specialized training, developing interoffice team for developing and servicing new clients etc.)

Describe any legal education that you feel is needed to increase your expertise in the areas in which you now practice or would like to practice in the future.

IV. Business Development (Sales)

A. Prior Year’s Business Development

1. Describe how you obtained additional business from existing clients this year. Identify significant clients and the types of work generated.
2. Describe significant marketing activities you participated in (speaking and writing, trade professional and business organizations and seminars).
3. List your most notable cases or transactions last year with marketing or client development significance.
4. Evaluate your business development strengths and weaknesses for you or the firm to address (e.g. providing additional training).

B. Cross Selling / Teamwork

How were you successful/not successful in introducing your clients to other lawyers and what changes do you plan to make in the coming year (list clients and lawyers)? Indicate any ideas you have for the firm to support your efforts. How were you successful/not successful in distributing work to other lawyers or practice groups and what changes do you plan to make in the coming year (list the types of work and lawyers)?

C. This Year's Marketing and Business Development Plan

1. Goals

What do you want to accomplish? List up to three goals below for your business and client development efforts in the coming year and beyond.

2. Client Development Opportunities

List your largest and/or best clients (5-10+) that have potential for additional business and/or cross-selling other firm services.

3. New Clients (Prospects) and Referral Sources

List your top prospects (5-10+) and referral sources you will be developing and continuing relationships with this year.

4. Cross Selling

- a. Identify the services either currently offered or needed by the firm that you think are important to your selling efforts.
- b. Do you have suggestions for the kinds of things that can or ought to be done to facilitate better cross-selling between practice groups and/or departments?
- c. Where are the best opportunities for cross-selling?

5. Activities

- a. Memberships
- b. Speaking
- c. Publishing
- d. Firm sponsored seminars/workshops/events
- e. Community organizations
- f. Pro bono work