

NAME _____ DATE _____

Individual Business Development Plan: Corporate/RE/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: return of land development and refinacings, 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:

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

- Client: _____ Nature of work: _____
- 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/Community organization: _____
- Client: _____ Trade/Community organization: _____
- Client: _____ Trade/Community organization: _____

Are you active in any of these trade organizations? Yes No

Which of these trade association(s) should you become *active in*? _____

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"

<p>_____ Speaking at conferences/seminars</p> <p>_____ Writing articles/blog posts/news alerts</p> <p>_____ Joining and networking in a trade group</p> <p>_____ Taking a leadership position in such a group</p>	<p>_____ Teaching CLE/CPE</p> <p>_____ Attending targeted industry-related events</p> <p>_____ Targeted pro bono or community relations work</p> <p>_____ Other (please specify) _____</p>
---	--

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 the firm could provide)

Client/New Service: _____

Client/New Service: _____

Identify two industries that interest you and in which you have had cases or files EXAMPLE: meatpacking or software development

- ✓ _____
- ✓ _____

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

✓ Action: _____ Deadline: _____

✓ Action: _____ Deadline: _____

Please list two-three prospective clients— people you know of or only casually 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 (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: _____