

NAME _____

DATE _____

Individual Business Development Plan: Litigation

SITUATION ANALYSIS

List two of your primary Strengths

EXAMPLE: numerous referral sources; memberships in trade groups

✓ _____

✓ _____

What should you do to take advantage of these?

List two of your primary Weaknesses

EXAMPLE: dislike social events or traveling, current caseload makes follow-through difficult; few local business contacts

✓ _____

✓ _____

What will you do to improve upon these?

List any Opportunities in your practice area

EXAMPLE: new areas of risk being insured, say cyber attacks, or a new law or regulation

✓ _____

✓ _____

What should you do to capitalize on these?

List any Threats to your practice area

EXAMPLE: client acquisitions or claims management changes; industry regulation or statutory changes

✓ _____

✓ _____

What can you do in response to these?

CURRENT BUSINESS

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

What are the best revenue producing cases in which you are currently involved?

Client: _____ Nature of claim: _____

Client: _____ Nature of claim: _____

Client: _____ Nature of claim: _____

What trade/community organization(s) is essential to executives, in-house counsel or key claims people of these clients?

Client: _____ Trade organization: _____

Client: _____ Trade organization: _____

Client: _____ Trade organization: _____

What trade/community organization(s) is essential to the lawyers or other professionals who referred you any of the best revenue producing case you listed above?

Client: _____ Trade organization: _____

Client: _____ Trade organization: _____

Client: _____ Trade organization: _____

Are you active in any of the trade organization(s) you listed above? Yes No

What trade (including bar) organization/association/club/community group are *you currently active in*?

What trade (including bar) organization/association/club/community group *should you become active in*?

Which clients or referral sources you consider key to your book of business have you not seen in person for more than 6 months? List and calendar a date by which you will meet with them

✓ _____ Deadline: _____

✓ _____ Deadline: _____

✓ _____ Deadline: _____

Who are the 3-5 people you already know well or peripherally and whom you should focus on making into clients or referral sources?

✓ _____

✓ _____

✓ _____

✓ _____

✓ _____

ACTION PLAN

Rank your level of interest in the following activities: (1 = "I'll do it"; 2 = "I might do it"; 3 = "I won't do it")

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

For items you ranked with a "1" list at least two actions you can take. Calendar deadlines. EXAMPLE: join and attend ABC Association meetings, speak at annual meeting of (name of group) and contact program chair by a certain date; write article on A

Activity: _____

Action: _____

Deadline: _____

Action: _____

Deadline: _____

Activity: _____

Action: _____

Deadline: _____

Action: _____

Deadline: _____

Are there current or recent clients of the firm with which you work that have additional lines of risk/litigation for which you think the firm could be retained? (List client and new type of claim/dispute/referrals you might obtain)

Identify a prospective group(s) of clients or referral sources by industry, say, meatpacking or amusement parks, and title, say, general counsel, that you would be interesting in pursuing:

✓ _____

✓ _____

✓ _____

What actions will you take to better familiarize yourself with this industry?

Action: _____ Deadline: _____

Action: _____ Deadline: _____

Please list two 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 deadline.

Action: _____ Deadline: _____

Action: _____ Deadline: _____

Identify two or three referral sources, people or vendors who share your targeted markets by name, company, industry (i.e., John Doe/ABC Insurance/commercial insurance broker, or Jane Doe/ABC Foods, risk manager)

✓ _____

✓ _____

✓ _____

What actions will you take to obtain referral(s) from each?

Source/Action: _____ Deadline: _____

Source/Action: _____ Deadline: _____

Source/Action: _____ Deadline: _____