

NAME \_\_\_\_\_ DATE \_\_\_\_\_

### Individual Business Development Plan: Family Law

List two of your primary Strengths:

EXAMPLE: numerous referral sources; memberships in bar or community groups

- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_

What can you do to take better advantage of these?

\_\_\_\_\_

List two of your primary Weaknesses:

EXAMPLE: dislike social events, don't like to ask for referrals

- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_

What can you do to improve upon these?

\_\_\_\_\_

List two primary Opportunities you see in your local

market: EXAMPLE: retirement of a senior competing lawyer, emerging sub-specialty such as collaborative cases or grandparent rights

- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_

What can you do to capitalize on these?

\_\_\_\_\_

List any Threats to your practice area:

EXAMPLE: changes in the law, national firms entering your market; firms specializing in, say, fathers rights

- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_

What can you do to defend against these?

\_\_\_\_\_

### CURRENT BUSINESS:

List the sources by occupation/specialty from which you have obtained desirable cases in the past 12-24 months EXAMPLE: Mental health professionals, criminal lawyers, past clients, business lawyers, judges, fellow club or bar association members

Of what trade/community organizations are those referrals sources you listed above members?

Source: \_\_\_\_\_ Organization: \_\_\_\_\_

Source: \_\_\_\_\_ Organization: \_\_\_\_\_

Source: \_\_\_\_\_ Organization: \_\_\_\_\_

Can you be active/should you be active in any of these organizations?  Yes  No

What other trade organizations/associations/community activities *are you currently active in?*

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

What other group have you looked at as a source of referrals or clients that has simply not worked over the past 12-18 months? Is it time to drop this group, or refocus your efforts there?

## **ACTION PLAN**

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

<p>_____ Speaking at conferences/seminars</p> <p>_____ Writing articles/blogging</p> <p>_____ Joining+networking in a trade/community group</p> <p>_____ Taking a leadership position in such a group</p>	<p>_____ Teaching targeted CLE or CPE to referral sources</p> <p>_____ Targeted pro bono or community relations work</p> <p>_____ Other (please specify) _____</p>
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For each item you ranked with a "1", list at least two actions you can take:

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

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

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

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

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

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

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

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

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

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

✓ \_\_\_\_\_

✓ \_\_\_\_\_

✓ \_\_\_\_\_

What actions will you take to obtain an initial or more referral(s) from each? Calendar these 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 actions listed above are completed? \_\_\_\_\_