

## Individual Business Development Plan: Contingent Practice

List two of your Strengths:

EXAMPLE: verdict or filing; membership/leadership position in brain injury association

- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_

What can you do to take added advantage of these?

\_\_\_\_\_

List two of your primary Weaknesses:

EXAMPLE: dislike social events, don't use social media

- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_

What will you do to improve upon these?

\_\_\_\_\_

List two Opportunities you see in your practice area:

EXAMPLE: developing a unique expertise, say, in vehicle defects, or referrals from business-only law firms

- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_

What will you do to capitalize on these?

\_\_\_\_\_

List any Threats to your practice area:

EXAMPLE: Competitors increasing advertising, statutory changes, tort reform/caps

- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_

What will you do to defend against these?

\_\_\_\_\_

### CURRENT BUSINESS

Think of your top two-three current referral sources. What trade/social/community organizations are they active in?

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

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

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

Are you active in any of these organizations?  Yes  No

Do these sources have continuing education requirements which you might teach or publications in which you might be able to write an article?  Yes  No

What trade organizations/associations/community-social groups *are you currently active in?*

\_\_\_\_\_

What trade organizations/associations/community-social groups *would you like to become active in?*

\_\_\_\_\_

Which former 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 each

- ✓ \_\_\_\_\_ Deadline: \_\_\_\_\_
- ✓ \_\_\_\_\_ Deadline: \_\_\_\_\_
- ✓ \_\_\_\_\_ Deadline: \_\_\_\_\_

# **ACTION PLAN**

Rank your level of interest in the following professional activities: 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/blogging</p> <p>_____ Joining and networking in trade/community group</p> <p>_____ Taking a leadership position in such a group</p> |  | <p>_____ Teaching targeted CLE or 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 will take:

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

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

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

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

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

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

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

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

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

List two prospective groups of referral sources

Examples: MADD or brain injury victim advocates, law enforcement officers, occupational therapists, right-of-way professionals

- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_

What actions will you take to better familiarize yourself within these groups and the key meetings, continuing education and vendors serving each? Calendar deadlines.

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

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

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

- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_
- ✓ \_\_\_\_\_

What actions will you take to create a referral relationship with each?

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

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

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