INDIVIDUAL LAWYER’S
BUSINESS PLAN WORKSHEET
Excerpt from
The Law Firm Associate’s Guide to Personal Marketing and Selling Skills

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

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

II. Productivity Goals

<table>
<thead>
<tr>
<th>Billable Hours</th>
<th>Billed Hours</th>
<th>Fee Receipts</th>
<th>Originations</th>
<th>New Clients</th>
<th>New Matters</th>
</tr>
</thead>
</table>

How will success be measured?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

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 successful/not successful were you in introducing your clients to other lawyers and what changes do you plan to make in the coming year (list clients and lawyers)?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

How were you successful/not successful in distributing work to (or receiving work from) other lawyers or practice groups? 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 for your business and client development efforts in the coming year and beyond:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

2. Client Development Opportunities
List the largest and/or best clients (5-10+) you have/did work for 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
(Cross-selling, in its simplest terms, is servicing the same client across different practice areas)

Identify the services either currently offered or needed by the firm that you think are important to your selling efforts.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Where are the best opportunities for cross-selling?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

5. Activities

Memberships

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Speaking

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Publishing

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Firm-sponsored seminars/workshops/events

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Community organizations
Pro bono work

6. How will progress be measured?