

LAWYER'S BUSINESS PLAN WORKSHEET

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 and Benchmark Metrics

	Upcoming	Past year	2 years	3 years
Billable Hours				
Billed Hours				
Fee Receipts				
Originations				
New Clients				
New Matters				

Notes:

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. 2 | Page

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?
