

In 2014, my ultimate business plan goal is to:

Increase my billings from \$ _____ to \$ _____

Increase my business from existing clients by _ percent.

Acquire _____ new clients in 2014/2015.

1) Target practice areas:

a. List areas

2) Identify Referral Markets:

- a. Existing clients
- b. Business owners
- c. Property management companies
- d. Russian speaking demographics
- e. Members of the community
- f. Lawyers in non-competing areas
- g. Law school alumni
- h. Involvement the non-profits, local churches
- i. Friends, family and parents of kids

3) Meet with **current** client/companies to discuss level of satisfaction or ongoing legal and business. Needs we are not presently addressing:

- 1. _____
- 2. _____
- 3. _____
- 4. _____

4) **Prospects** (referral sources or clients) for whom I believe I can do legal work. Research on LinkedIn, Chambers, Local events:

- 1. _____ Contact: _____
- 2. _____ Contact: _____
- 3. _____ Contact: _____
- 4. _____ Contact: _____

I will make a phone call or send a letter to set up an initial meeting with each prospective client to discuss business and legal needs.

The date by which I will call the primary contact to set up meeting for each prospective client is:

Prospective Client # 1: _____

Prospective Client #2: _____

Prospective Client #3: _____

Prospective Client #4: _____

Prospective Client #5: _____

- 3) Certain contacts, referral sources, acquaintances, clients have done an important favor for me, given me a referral or sent some extra business my way. I will send that person a modest gift (book, golf balls, bottle of wine, etc.) or a handwritten note thanking them for their help, referral or work.

1. Name: _____

Thank you gift idea: _____

Letter or gift to be sent by: _____

2. Name: _____

Thank you gift idea: _____

Letter or gift to be sent by: _____

- 4) Three current clients who may have additional legal needs that I am currently not serving. Maybe they do not know I do that type of legal work. I will contact at least one contact every quarter. I will ask questions about business growth, decline, struggles, employment issues, and areas in need of attention. I will use my network to connect them with someone who can assist them.

Name of client #1:

Possible additional legal needs or other needs:

With whom did I connect them?:

Name of client #2:

Possible additional legal needs or other needs:

With whom did I connect them?:

Name of client #3:

Possible additional legal needs or other needs:

With whom did I connect them?:

- 5) Current and prospective clients: Schedule a lunch or breakfast quarterly and come equipped with a list of questions.

Name of person:

Date:



Sample Marketing Action Plan with Tasks: For 30 days, 3 months and 6 months

Name of person:

Date:

Name of person:

Date:

Some questions to ask:

- How can I be more valuable to you?
- What do you like about my services? Where do you see areas for improvement?
- Does your company have any new hires?
- New long-term goals or strategies?
- How can I find more clients like you?
- What organizations are you involved in?
 - Do they need speakers?

- 6) Pay it forward and refer business to one of your current clients/referral sources or connect them with someone whom may be a potential client. Use LinkedIn to research.

Name of client/contact:

Introduce them to:

- 7) Invite a current client to an event/meeting/networking event:

Name of client:

Event:

Date of event:

- 8) For the next client meeting, meet at their business location.
- 9) Attend a trade show in an area related to a client's business. Commit to learning more about their areas of business. Offer to be a speaker.

Reputation Enhancement Marketing

I will pursue at least two of the following activities every quarter:

- Contribute to a newsletter or publication
- Volunteer at an event
- Attend a local business meeting event
- Make a presentation to a local bar association or association
- Ask for an introduction to a potential referral source



Sample Marketing Action Plan with Tasks: For 30 days, 3 months and 6 months

- Join a new organization or get more involved with an existing one
- Act as a host or sponsor for a charity or community service event and attend the even



Sample Marketing Action Plan with Tasks: For 30 days, 3 months and 6 months