

LEADERSHIP FOR LAWYERS_{LLC}

Personal Business Development Plan Template

Vision	Within X years, I will be
Purpose	My purpose is to ...
Self - Assessment	<ol style="list-style-type: none">1. I am passionate about...2. I am skilled at...3. I enjoy...4. I should avoid....
Target Market	I serve/will serve clients in ... (industry, situation, geography, specific legal needs, demographic class, etc...)
Specialization or Niche	I focus my practice primarily in (industry, type of law, solving particular problem, etc..) I want to be known as ...
Value Proposition	I help clients by (benefit of service). How do I provide value to my clients?
Differentiation	Three main qualities or services that set me apart from my competitors <ol style="list-style-type: none">1.2.3.
Examples of past success	Three (or more) stories that illustrate my value proposition and differentiation. <ol style="list-style-type: none">1.2.3.
2-5 year Outcomes	Specific results of business development success. For example, originate and manage three major White Collar Crime cases, or raise origination billings to \$2M a year for two consecutive years. <ol style="list-style-type: none">1.2.3.
One Year Outcome	What I will achieve one year from now. For example, dollar amount of new originations, number of new clients, number of existing clients expanded into new areas, number of speeches or articles, number of one-on-one meetings with clients, etc.

Existing Clients to Grow	Target Company & Individual Contact Info	Objective	Way to add value	Next Step
Potential Clients	Target Company & Individual Contact Info	Objective	Way to add value	Next Step
Internal Networking	Internal Contact	Client with whom you want introduction	Hook	Follow up
Referral Sources	Name	Company	Type of Advisor	Phone/Email
Internal Marketing	<p>How will I communicate within my firm:</p> <ul style="list-style-type: none"> - How to identify a client that could use your expertise/experience? - How to communicate your value proposition to clients and potential clients? - How to best introduce me? 			

External Marketing	Speaking, writing, blogging and other activities to ‘broadcast’ you my expertise and attract targeted potential clients.	
Industry Associations, Conferences & Events	Which industry associations do my clients and potential clients belong? How will I engage with the group so that I am seen as thought leader in the industry?	
Civic Organizations	Which community groups will I volunteer and be a leader in to develop trusted relationships among potential clients?	
Training/Coaching	What training or coaching do I need to accomplish your business development goals?	
Action Items – 30 Days	What specific tasks do I need to complete in the next 30 days?	
	Task	Completed By
	What specific tasks do I need to complete in the next 90 days?	
	Task	Completed By

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Developing a Personal Business Plan

1. Purpose & Vision
 - a. Who do you want to be when you grow up?
2. Self-Assessment
 - a. What am I passionate about in life?
 - b. When I am not at work, what do I enjoy doing?
 - c. In what area of law do I want to specialize?
 - d. What skills do I have?
 - e. What skills do I want to develop?
 - f. What personality traits do I have that apply to business development?
 - g. What kind of work do I want to do?
3. Target Market
 - a. With what kind of clients do I want to work?
 - b. In what industry are my prospective clients?
 - c. To whom can I offer the most value?
 - d. For what do I want to be famous? Expert?
 - e. What kind of work would I do for free?
4. Specialization
 - a. What keeps my clients awake at night?
 - b. How can I help my target clients solve their biggest problems?
 - c. What skills do I need to develop or be better able to help my target clients solve these problems?
 - d. How else can I become more valuable to my target clients over time?

- e. In addition to legal services that I provide my clients, are there additional complementary non-legal services that I could offer that would increase the value I can provide?
 - f. What steps will I take—specifically—to build your professional reputation (speaking, writing, etc.). In what areas will I work to enhance my reputation? How? When?
5. What is your value proposition? How do clients benefit from working with you?
6. Differentiation
- a. How can I stand out from the crowd through leadership in my area of specialization?
 - b. How can I stand out from the crowd through innovation in service delivery?
 - c. Can I package, deliver or price my services in a way that is attractive and beneficial to my clients?
 - d. Are there strategic partnerships or relationship that will allow me to offer more value to my clients?
7. Existing Clients
- a. What will I do—specifically—to nurture and develop existing clients for whom you work? When will I do it? Who else will be involved?
 - b. What will I do—specifically—to help cross-sell other offices and practice areas? Ancillary Services? When will I do it? Who else will be involved?
 - c. Identify specific clients and your goals for visiting them, learning more about their business, cross-selling, asking for referrals, etc.
8. New Clients
- a. What will I do—specifically—to develop new clients? When will I do it? Who else will be involved?
 - b. What steps will I take—specifically—to network with potential referral sources? Who? When?
 - c. Identify specific target prospects.
9. Internal Marketing
- a. Who in the firm can I learn from?

- b. What type of work will help me meet my goals?
- c. Are there clients, networks, leadership positions that I can grow into a leadership role?
- d. Who in the firm can introduce me to clients, organizations, networks, etc that will help me meet my goals?
- e. What is the highest value I can bring to a client team?

10. Action Items

- a. What is my ‘elevator pitch’ or ‘verbal business card’? ex: I help (target client) to (value proposition) by (specific services). Plus, three points of difference.
- b. What is my “story”? What is the firm’s “story”? What makes you credible?
- c. What industry, bar or professional groups will I participate in? How?
- d. What community or civic groups will I participate in? How?
- e. What organizations will I work towards serving in a leadership position? By when?
- f. Based on my personal assessment, what will I do to develop a reputation as an “expert”? Speaking? Writing? Networking?
- g. What activities will I undertake to develop skills (training, coaching, etc.)?
- h. Are there others in (or outside of) the firm that can join me in “team marketing”?
- i. Whom can I meet with one-on-one to help develop business?
- j. Whom can I help?

11. Time Horizon

- a. What can I do NOW?
- b. Goals for 1 month, 3 months, 1 year
- c. Long-term goals

12. Measurement & Accountability

- a. How will I measure my goals? New revenue? Number of new clients? Expansion of work for existing clients? Involvement with target market? Number of articles, speeches, etc?
- b. To whom will I be accountable? How often will we meet? What do I expect from a “mentor”?

13. Expected Results

- a. What do I expect from my efforts in the short and long term?