



BUSINESS DEVELOPMENT ACTION PLAN TEMPLATE

Name: _____ Date of Plan: _____

Revenue Target \$ _____ To be achieved by (date): _____

Number of New Clients Goal: _____

1. BACKGROUND INFORMATION:

Major area(s) of practice: _____

Legal service(s) provided: _____

Key client experience: _____

Associations/Organizations/Board Memberships: _____

Other related business experience: _____



2. TARGET MARKETS (INDUSTRIES):

A. Target Market 1: _____

B. Referral Markets: _____

C. Contacts (Minimum 2-3 per market): _____

D. Legal Services to offer:

Service	Service
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Service	Service
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Service	Service
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E. Industry Associations: _____

F. Industry Publications: _____

A. Target Market 2: _____

B. Referral Markets: _____

C. Contacts (Minimum 2-3 per market): _____



D. Legal Services to offer:

Service _____ Service _____

Service _____ Service _____

Service _____ Service _____

E. Industry Associations: _____

F. Industry Publications: _____

3. NEXT STEPS (3-6 MONTH “TO DOs”):

1. Task/Action: _____

Deadline (Date): _____ Stage of Sales Process: _____

2. Task/Action: _____

Deadline (Date): _____ Stage of Sales Process: _____

3. Task/Action: _____

Deadline (Date): _____ Stage of Sales Process: _____

4. Task/Action: _____

Deadline (Date): _____ Stage of Sales Process: _____

5. Task/Action: _____

Deadline (Date): _____ Stage of Sales Process: _____

Important! Update this template monthly.

BUSINESS DEVELOPMENT ACTION PLAN KEY

1. BACKGROUND DATA:

- Identify specific area of practice.
- List 2-3 legal services you offer.
- Identify 2-3 key clients—either personal, practice or firm-related—with whom you have worked.
- List all associations/organizations—legal, industry or community—to which you belong or serve on as an advisor. Your goal is to develop your role within the organization as a client development tool.
- Highlight any additional business or law experience you have that may be valuable.

2. TARGET MARKETS:

A. Target Market:

Identify an industry or a type of company which you are involved with or for which you perform a substantial amount of work.

B. Referral Markets:

Identify other business sources which provide services to this market, e.g., an accountant, lending officer, broker or lawyer (in firms that do not offer these services or are in another geographical area). These can be developed as contacts who can refer you business.

C. Contacts:

Identify contacts/peers (e.g., President, VP/Director of Human Resources, Chief Financial Officer, General Counsel, other staff lawyers with whom you have worked directly in companies that are within your target market).

D. Legal Services to Offer:

Define services needed by the target market from a client's perspective [e.g., focus on the fact that you have experience in low-income-land-use planning (a service) which is of value to the prospective client (a benefit)].

E. Industry Associations:

Identify industry associations, board of directors, and program chairs. Check to see if the association holds trade shows or publishes a news letter.

F. Industry Publications:

Identify industry publications, their editors-in-chief and article submission deadlines.. Obtain an editorial calendar for issues related to your areas of interest.

3. NEXT STEPS:

- Develop action items to implement within the next 3-6 months and assign a deadline to each.
- Identify at what stage in the sale process you are.
 1. Pre-Approach
 2. Approach
 3. Qualify and Assess Needs
 4. Strategize
 5. Address Needs/Present Solutions
 6. Obtain Engagement