

**INDIVIDUAL BUSINESS PLAN OF _____
FOR 200_**

1. Short Summary of my Plan

- a) What do I want for my practice in 200_?

2. Current Individual Profile

- a) I presently practice in the following area(s):

- b) What is my experience, education?

- c) What makes me different or unique in my practice? What is my competitive advantage?

- d) What is my reputation in the legal community?

- e) My strengths include:

- f) My weaknesses include:

- g) My role in the firm is:

- h) My clear introductory statement of my services is:

- i) My major clients (or the type of clients with whom I spend significant time working) are:

- j) My major sources of new business have been/are:

- k) I would describe my management skills as:

- l) What is my commitment to my practice development?

3. My vision for my practice is:

4. My mission statement for my practice is:

5. Past year report

- a) In 200_ I billed and collected: (How much was originated by me?)

- b) My work came from the following sources:

- d) How can I increase my visibility and credibility in and outside the legal community?

8. Criteria for Success

- a) What do I need to be thinking about?

- b) What further training do I require to reach my goals?

9. Marketing Plan – Outside Marketing

- a) What's my marketplace? Who and how many people/businesses want my services? What do I know about them? What are they willing to pay for? What are the shifts and trends?

- b) Who are my competitors and what are they up to? What do I need to learn about my competitors?

- c) Identify strategies for retaining and developing relationships with existing clients.

- d) Identify existing referral sources of business and strategies for further developing those referral sources.

- e) Identify possible new clients by name or industry, along with your plan or ideas for developing them into clients.

- f) Identify organizations whose members may be potential clients or referral sources.

- g) Identify seminars that might be appropriate for business development.

- h) Newsletters/mailings. Identify potential subjects for newsletters and/or mailings, and individuals to target.

Attach an action plan to carry out your marketing plan with specific actions and dates.

10. Cross Marketing within the Firm

- a) How can I market my services to the other attorneys within the firm?

- b) Who are possible internal referral sources (e.g., individual attorneys; firm clients; staff)?

- c) What do I know about the other lawyers in the firm to cross refer to them?

- d) What will I share with my clients about the other disciplines of lawyers in the firm?

e) Identify strategies for marketing services by practice group or areas of expertise:

11. Non-billable Work

a) Identify your non-billable work including marketing, firm responsibilities, volunteer work, *pro-bono*:

b) Describe how this work helps you in your career:

12. Personal Life:

a) What needs to be in place in my personal life to support my practice goals?

13. Billable Work for 200_:

a) Nature of fees – Factors to consider in setting fee - consider your competition, costs, value to client, current state of practice and experience.

b) How many hours will you bill this year? Your monthly goal? Your weekly goal?

c) Project revenue for 1 year, 2 years, 3 years.

- d) What are your projected expenses? Include lunches, coaching fee, professional organization memberships, parking, client entertainment, gifts, cards, advertising, etc.

- e) What reports would you like to review? (Monthly update of income billed, expenses, aging of receivables, time spent but not billed)

14. Risks and Concerns

- a) My concerns are:

15. Attachments

- a) My resume
- b) Marketing Plan
- c) Website/brochure
- d) Financial Information
- e) Overall Action Plan