



# FLEMING STRATEGIC

BUILDING THE PRACTICE WITHIN THE FIRM

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## Business Development Plan Template

Your answers to the following questions will help to clarify your business development goals, the strategies most likely to be effective, the successes on which you can build, and the attitudes and skills that you may want to develop more fully. Allow at least an hour to complete this assessment. The more fully you respond, the more useful you'll find this exercise.

### Part One: Self-Assessment

- 1. How would you characterize your goals for your practice?** Do you live to work, or do you work to live? Why do you want to grow your practice?

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**2. How would you characterize the nature and scope of your practice?**

**a. What is your focus of your practice? If your practice encompasses multiple areas of the law, what umbrella unifies them?**

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**b. What kind of work do you most enjoy doing?** \_\_\_\_\_

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**c. How would you describe yourself as a lawyer? What sets you apart from other lawyers who have a similar practice and similar clients? Consider not only your practice competencies and skills but also your client service habits, your activities that are outside work but bear on work, etc.** \_\_\_\_\_

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**3. How do you approach your practice and your clients?** For example, do you tend to be collaborative or directive with clients, the degree to which you individually tailor your process for each client, and how you express those tendencies through your client work. \_\_\_\_\_

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**4. What kind of client experience do you want to create?** In other words, how will your clients perceive working with you, other members of the team, and your staff, how will you orient them to what they should expect within the representation, what kind of education (if any) do you need to provide concerning the process surrounding the matter, how accessible will you be to your clients, etc.? The experience you create will flow from your Attorney Avatar.

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**5. What is your primary and secondary marketing identity?** Consider these Rainmaker Identities: the Entertainer, the Authority, the Educator, the Connector, and the Anguished Invisible. Which marketing identities most reflect your natural tendencies?

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competitors and to reach your ideal clients and referral sources. \_\_\_\_\_

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**9. What are your best marketing avenues? Consider local, national, and (where appropriate) international avenues.** Marketing avenues are the actions you take to raise your profile in the marketplace and to reach your ideal clients and referral sources to secure new work. Each marketing identity is well suited to certain avenues. For examples, writing and speaking are best suited for the Educator and the Authority, though every marketing identity can use those activities in some way. Advertising on a billboard or on television, however, is often limited to the Spectacle. Your most effective marketing avenues lie in the overlap between your marketing identity and the modes of outreach most likely to affect your Client Avatar and referral sources in a positive way. \_\_\_\_\_

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**10. What topics and subjects will you address through your marketing?** One of the most effective ways to market a practice is through the use of content creation (which is written or spoken), and you need to know specifically what topics (your practice area) and subjects (subcategories within your topic) you will address and how. When you identify your subjects and topics, you will prime yourself to be on the lookout for ideas you can use to create content. \_\_\_\_\_

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**11. Where will you distribute your content?** Name specific publications and conferences, to the extent you can. \_\_\_\_\_

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**Part Two: Create Your Plan**

**12. What business development goals would you like to realize?** Be as specific as possible in terms of dollar values, type of cases, size of cases, whether you would continue to be responsible for the case, actually do the work, or pass on all responsibility to someone else, etc. The more specific you can be in this step, the more carefully you can tailor your strategy so you reach the goals you set.

a. **In the next six to eight months?** \_\_\_\_\_

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**13. What is your immediate priority: branding or securing new work?**

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**14. Create your nurture list.** Your nurture list is a subset of your comprehensive contact list, including 10-15 top priority contacts with whom you want to build or deepen a relationship, with an eye toward securing new work or opening doors that you can use to raise your profile in the marketplace. Keep this list close at hand so that you can be in touch with everyone on your list on average every 6-8 weeks.

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**16. Identify current or former contacts who may need additional services from you or from colleagues in your firm.** \_\_\_\_\_

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**17. How will you follow up with the contacts you listed in response to questions 15-17?** How can you initiate business conversations, how can you raise your contacts' awareness of you, your practice, and your capabilities (or those of your colleagues, if you're marketing colleagues rather than your own practice), and how can you learn about the needs of potential and current or former clients so that you can move into a conversation about solutions to their needs?

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**20. What accountability do you need to ensure that you implement your plans?**

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**21. What training, coaching, or mentoring do you need? Consider the aspects of marketing and business development in which you are least comfortable and least confident in your skills.** \_\_\_\_\_

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