



The Reluctant Rainmaker **Business Development Plan Generator**

Name: _____

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. The more fully you respond to these questions, the more useful you'll find this exercise.

Part One: Self-Assessment

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

a. **What is your specialty?** _____

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

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.

2. **Who are your ideal clients?** Create a geographic, demographic, and psychographic description.

3. **Who are your referral sources?** Create a profile of those who would be in a position to refer ideal clients to you. If possible, include names of people you know who match the profile you create. _____

4. What are your communications strengths? Do you enjoy writing, making formal presentations, talking with groups, or meeting with people one-on-one?

5. What obstacles do you see in reaching your business development goals?

6. What opportunities do you see that flow from those obstacles?

7. What commitments must you meet, both professional and personal? Note which are non-negotiable and which could (and perhaps should) be eliminated.

8. How much time remains for rainmaking activity after you've fulfilled your other commitments? Most lawyers are unlikely ever to *find* time for business development and will instead need to *create* it. Identifying how much time is currently available in your schedule will help you to appreciate the changes that will be required so you can reach your goals. _____

9. How did you acquire the clients you have today? List activities (speaking, Board memberships, civic and community activities, etc.) as well as contacts and referral sources. With the benefit of hindsight, what would you change? _____

10. Describe the circumstances in which you've felt most effective in landing new clients or business.

11. Describe the circumstances in which you've felt least effective in landing new clients or business.

12. In what areas (relating to business development and/or marketing) are you uncomfortable or not as confident as you'd like? _____

13. On a scale of 1 (not at all) to 10 (very high), how concerned or worried are you about developing new business? Describe the circumstances that underlie your level of concern. _____

Part Two: Plan for Rainmaking Success

14. What business development goals would you like to realize? Be as specific as possible in terms of dollar values, type of cases, size of matters, whether you would continue to be responsible for the matter, 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?** _____

b. **In the next year to 18 months?** _____

c. **In the next three to five years?** _____

15. What is your strategy for reaching these goals?

16. What tactics will you use to implement your strategy? _____

17. On a scale of 1 (low) to 5 (high), rank your skill and comfort level with the following marketing and business development activities, and note how applicable each is to your practice and how often you will engage in each:

Activity	Skill	Comfort	Applicability to your practice	Frequency of use
Writing (articles, book chapters, etc.)				
Speaking to lawyers (i.e. CLE presentation)				
Speaking to non-lawyers (i.e. community meetings)				
Bar association work				
Judicial organizations				
Other professional organizations (AAS, AICPA, etc.)				
Board membership				
Political contacts (fundraising, active campaign participation, etc.)				
Formal networking				
Informal networking (club membership, golfing, tennis, etc.)				
Religious activities/membership				
Online networking (LinkedIn, FaceBook, etc.)				
<i>Pro bono</i> activities				
Charitable groups				
Staying in touch with your network				
“Working” your network (i.e. making requests for referrals, requests for introductions, etc.)				
Asking for business				
Other (specify)				

Challenges and Motivations

18. Describe the time and energy challenges you find in managing your practice, your business development efforts, and your personal life. Do you have trouble meeting your obligations (professional or personal)? Do you have the “bandwidth” to take on new business? What support will you need to reach the business development goals you’ve identified?

19. What are the 3 biggest obstacles you must overcome to reach your goals? ____

20. What assistance do you need for your rainmaking efforts? Do you need support from an assistant(s) to help with contact management, preparation of written materials, etc.? What structure do you need to create accountability?

21. Why do you want to achieve the goals you've identified? In other words, what's your reason for wanting to build a book of business?

Part Three: Implement Your Plan

22. What are your first (or next) steps in implementing the plan that you have designed? Make a list of the tasks ahead of you in the next one to three months. Parts One and Two of your business development plan form a document that will guide development of the task-based part of the plan. Calendar your activities, and calendar a check-in within the next three to four months to see how your plan is performing and what adjustments you must make. (We will work on this together, but I'd like to know what steps you can currently forecast.)