

2019 ATTORNEY BUSINESS PLAN

Name: _____

Date: _____

Your business plan is the key to organizing your non-billable hours and using your time wisely to accomplish your individual goals. Start with setting goals that will stretch you and energize you and then develop a plan to achieve them.

This worksheet is provided to assist you in developing your business plan for 2019. Under Roman Numeral III, there are a wide range of options. The wide range is merely to give you ideas. It is not intended for you to try to do all of the activities. To the contrary, it is more important focus on a few things and do them well. Careful planning and focus will increase your likelihood of success.

I. BUSINESS DEVELOPMENT GOALS FOR 2019

Describe briefly your three or four business development goals for 2019. They should be specific and, if possible, measurable (for example, making contact with _____ people a month; writing _____ articles; speaking at _____ industry meetings; development of a particular client or group of clients; bring in \$_____ business; increase business brought in to \$_____; increase collected production value to \$_____; provide \$_____ of business for associates in your practice group; expand business with ABC client by \$_____; obtain ___ new clients over next 12 months; and develop unique solution to a burning issue for clients in the _____ industry).

A. _____

B. _____

C. _____

D. _____

E.

II. TOTAL BILLABLE AND NON-BILLABLE HOURS

A. Billable Hours _____

B. Non-Billable Hours _____

Non-Billable Activities	
Firm Administration	
a.	
b.	
c.	
d.	
Profile Building (Section III)	
Relationship Building (See Section IV)	
CLE/Professional Improvement(Section V)	
<i>Pro Bono</i> (Section VI)	

Total Billable and Non-Billable Hours:_____

III. PROFILE BUILDING

A. In this section, focus on your profile/reputation building activities. In each category, indicate how you plan to proceed. Recognize that for most lawyers business development activities done today are not likely to generate revenue right away, so be patient.

B. Professional/Bar Organizations

Name of Organization	Membership Composition	My Activity/ Role		

Estimated number of hours: _____

C. Community, Civic, Political or Charitable organizations

Name of Organization	Membership Composition	My Activity/ Role			

Estimated number of hours: _____

D. Trade and Industry Associations

Name of Organization	Membership Composition	My Activity/ Role (Presentations, Meetings, Writing etc.)			

Estimated number of hours: _____

E. Books, articles, blogs and other writing:

Subject	Publication (if known)			

Estimated number of hours: _____

IV. RELATIONSHIP BUILDING

A. Existing and Potential Client Contacts.

Client/Potential Client Name			Actions to be Taken (Visits, Roundtables, Workshops etc.)	Target Date

Estimated number of hours: _____

B. Existing or potential referral sources

Referral Source Name	Presently Referring? (Y/N)	Clients Referred	Actions to be Taken (Visits, Workshops etc.)	Target Date

Estimated number of hours: _____

C. New client development RFPs, presentation teams, etc.):

Prospect	Activity	Resources Needed	Actions to be Taken	Target Date

Estimated number of hours: _____

D. Internal marketing activities (marketing training, firm database, office marketing initiatives, practice group marketing initiatives, etc.):

Activity	Contribution I Can/Will Make	Target Date

Estimated number of hours: _____

V. CONTINUING EDUCATION/PROFESSIONAL IMPROVEMENT

A. Legal Education

Activity: _____

Location: _____

Estimated number of hours: _____

B. Industry/Business Education:

Activity: _____

Location: _____

Estimated number of hours: _____

C. Leadership, Writing, Speaking or Management education:

Activity: _____

Location:

Estimated number of hours: _____