CORDELL PARVIN LLC

Client Development Series

Participant Guide

Securing, Retaining and Expanding Relationships with Your Clients

Letter from Cordell

I am delighted that you have decided to participate in our Securing, Retaining and Expanding Relationships program. The six-module video was recorded live at a training event in our Dallas conference center. I recorded this program and created the detailed participant guide to enable every highly motivated lawyer the opportunity to develop business using the approaches that worked for me and work for the many lawyers I coach.

The information you will learn in the videos is the most current available and critical to effective client development. Because the video was shot from a live program, to make it easy to use with the participant's guide, I've done the following:

1. Included in the participant guide critical slides, questions, planning templates and other information from the video to make note taking and learning easier and more effective for you.

2. Provided responses of the attorneys who participated in the recorded sessions. I've done this because at times it may be difficult to hear these participant responses. Of course, what is most important is your response to the questions.

3. Included recorded instructions from my friend and colleague, Dr. Cindy Pladziewicz, before and after each module so it's easy to follow from module to module.

I look forward to hearing from you regarding your experience with the program. Cindy and I are happy to take your questions as you go through the modules.

Instructions for this Program

This program consists of 3 hours of video and a minimum of 2 hours of exercises contained in this Participants Guide.

To access the video go to http://www.cordellparvin.com/multimedia/video.html

This video program can be completed in one session, however to get the most benefit it is best completed over time with sufficient time devoted to work through the exercises.

About Cordell Parvin

Cordell Parvin practiced law for more than 36 years. He was a Practice Group Leader and developed a highly successful national construction law practice. During his career, Cordell taught, mentored and coached young lawyers on their careers, professionalism, client management, and work-life balance.

At Jenkens & Gilchrist, PC, Cordell initiated and directed the firm's Attorney Development Program. He created a comprehensive program for associate development focused on skill development, mentoring, shadowing and career planning. Cordell motivated the leadership of his firm to get behind the associate development program and to focus attention on the importance of career planning.

He has a passion for teaching and coaching young lawyers. He recognizes that each lawyer has unique skills, talents and dreams. He works with lawyers as individuals and seeks to inspire and energize them based on their individual career and life dreams.

About Cynthia Pladziewicz

Dr. Cindy Pladziewicz is a licensed psychologist, attorney and Professional Certified Coach (PCC). Her professional experience includes practicing as a Partner, and serving as Chief Development Officer, with the law firm of Thompson & Knight LLP, ten years in private practice as a psychologist at Baylor University Medical Center in Dallas, and service on the board of a publically traded corporation. As an adjunct professor, she taught and developed courses in law and psychology at Southern Methodist University.

She frequently speaks and writes about lawyer leadership, coaching and career development. Her work has been featured in the American Lawyer, Law Firm, Inc., the ABA Journal online, the Dallas Morning News, the Dallas Business Journal (2009 Changemaker Award), Metro Newspapers and D Magazine. Cindy holds a BBA in Accounting with special distinction from the University of Oklahoma, a J.D. with honors from Southern Methodist University Dedman School of Law and a Ph.D. in Clinical Psychology from the University of Texas Southwestern Medical Center at Dallas.

Contents

Program Goals and Objectives

Goals

During this program you will learn what, why, and how to change your client development efforts to achieve greater success and more enjoyment in your law practice and daily life.

This program will:

- ♦ Help you build the foundation to make client development a part of your regular routine;
- ♦ Furnish practical examples of client development activities that work;
- ♦ Stimulate ideas on how to develop valuable relationships with your clients; and
- ♦ Empower you to take the client development actions that will achieve your goals.

By the end of the program you will:

- ♦ Define your target market and referral sources to broaden opportunities;
- ♦ Initiate a client development plan with goals and begun to take actions and be accountable;
- ♦ Create a 90 day action plan;
- ♦ Review, update and enhance your bio;
- ♦ Identify trade, industry or client organizations for which you will become the "go-to" person by writing, speaking, and listening; and
- ♦ Discover your learning style and personality type and those of your clients.

How to Maximize Your Experience

- Participate by giving ample time for completion of all exercises;
- Determine that client development activities will become a habit; and
- Pick a learning partner to go through the program with you.

Module 1 Introduction to Client Development

(Follow along as you watch the video)

Four Eras of Client Development

1. Do Good Work
2. Unsolicited Contact
3. Websites / Branding
4. Being Remarkable, Extraordinary, Memorable

Module 1 Exercise
Client Development Self-Assessment – Where Are You Now?

1. On a scale of 1-10 rate where you are right now in your client development efforts using the scale below.

1-3 Totally Lost	4-7 Midpoint 50/50	8-10 Totally "Get It"
Don't have any clue where to start or what to do	Have some idea of what to do, but need to improve	Have a game plan and am implementing it with great success

My Self-Assessment is ____________

2. What are your origination numbers (or whatever numbers your firm uses for tracking)?

    a. What percentage of that number did you bring in yourself and how much is shared?

    b. Where would you like to be in 1 year?

    c. Where would you like to be in 5 years?

3. List your client development activities below. For each activity please rate on a scale of 1-10 your subjective rating of the success of the activity over the past 12 months. An activity is "successful" if it takes you closer to your client development goals; for example obtaining new clients, expanding relationships and work obtained from existing clients, obtaining referrals or pitch opportunities, and/or increasing your visibility and credibility with your target market. Finally note any adjustments you can make to improve the efficiency or effectiveness of the activity.

Client Development Activity	Rate Success (1-10)	What adjustments can you make?

4. Have you obtained any new clients in the last year?

   a. How did you obtain those clients?

5. Have you expanded relationships with any clients over the last year?

   a. What did you do that enabled you to expand relationships with those clients?

		Yes	No
6.	Do you have a written plan for this year?		
7.	Do you have written goals for what you want to achieve this year?		
8.	Do you plan each and every week what your client development activities are going to be?		
9,	Do you have a system to stay in contact with your contacts?		
10.	Do you regularly visit your clients at their office without charging them?		
11.	When you see an article, book, seminar or workshop that you think would be valuable to your client, do you send it to them?		
12.	When you finish a project do you get feedback from your client?		
13.	When you are visiting with clients do you listen to your client more than 50% of the time by asking good question?		
14.	Are you reading your client's trade publications?		
15.	Do you belong to the associations or industry organizations your clients belong to?		
16.	Do you personally know your client representatives, their assistant, their spouse, how many children they have, what their interests are?		
	Total		

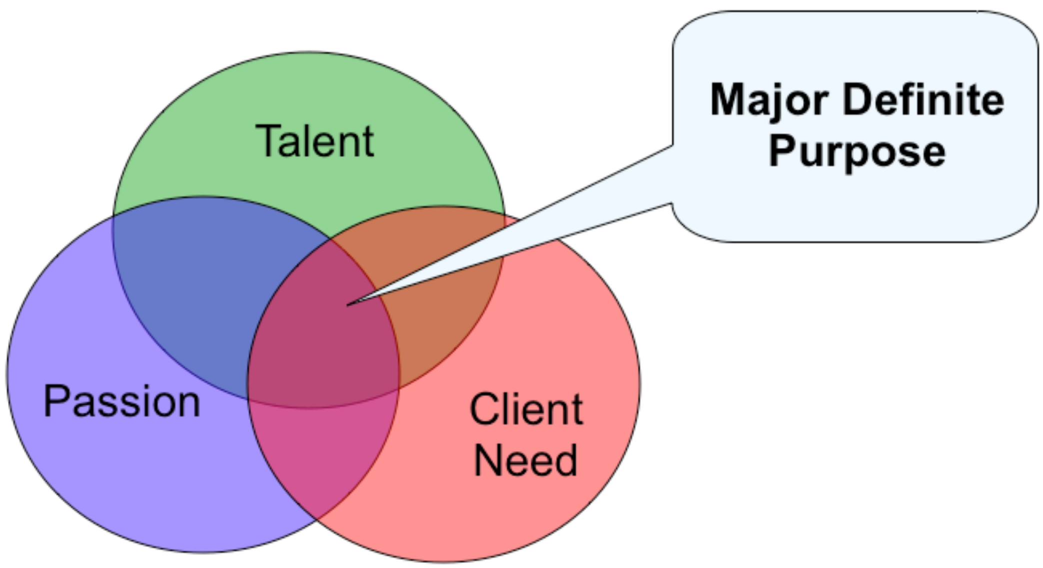
17. List the things that are holding you back from reaching your goals:

Module 2 Build Your Plan / Planning

(Follow along as you watch the video)

There is great evidence supporting the conclusion that people with written goals and a plan to achieve them are far more likely to be successful. All of us have the same amount of time each day. Time and energy are our most valuable resources. In order to use those limited resources effectively you must have a plan. Planning allows you to invest in your continued education in order to serve your clients in a professional and effective manner.

A well thought out plan will help you to prioritize, focus and execute.



Module 2 Exercise
Target Market Duration: 10 minutes

You have to narrow your target market, study your potential client's business and become visible to that market by creating content the potential clients and referral sources find valuable. I coined a phrase "if you market to everyone you market to no one". You have to narrow your client development efforts in some way. In my book *Prepare to Win* (pg. 104), I explain the process of selecting a target market:

> In the beginning, I thought narrowing my focus to one area would limit my opportunities. Because dozens of commercial litigators were in my city, I found it very difficult to develop business other than by word of mouth, which was a slow process. Despite my networking efforts, I found myself waiting for that next case to come to me. Slowly, but surely, I learned that when you market to everyone, you market to no one.
>
> In 1978, I started on a new path. While I continued to litigate a wide variety of cases, I focused my marketing efforts on the construction industry. I wrote and published a law review article and spoke at the American Bar Association convention on a construction law issue. I became active in local construction industry associations, frequently speaking at their meetings and conventions. I wrote articles and created workshops on issues that affected their business. I was suddenly considered the "go-to" lawyer on construction matters. I began to build relationships with association executives who recommended me to their members.
>
> Crosslin, Slaten, and O'Conner, a firm in Alabama, is a good example of focused marketing. A great deal of their work came from clients in the pest control business. When they focused on that industry, they became known as "The Bug" law firm. They wrote articles in pest control magazines and gave presentations at pest control industry functions. They even created a Web site called buglaw.com. Your niche can be based on the type of work you do (such as ERISA) or the industry you want to serve. In my experience, those who focus on an industry usually have an easier time building their reputations.

You do not have to focus on a particular industry or practice of law, but you have to narrow your focus from everyone to something that is more manageable.

Define Target Market

What is your expertise?

____

____

Who needs your expertise?

Who is your target market (i.e. the client you will enjoy working with who needs (and will pay for) your expertise – industry, size and location)?

What do you want your target market to hire you to do?

Become Visible and Credible to Target Market

What do you need to learn that you do not already know? (e.g. challenges your clients in that industry are facing)

How can you become visible and credible to your target market?

What associations do your clients belong to?

Who are your referral sources?

Module 3 Build Your Plan

(Follow along and answer the questions as you watch the video)

When I prepare plans I work both forwards (bottom up) and backwards (top down). By that I mean I look at the list of action items and I look at the hours I will have to spend on client development and other non-billable activities. Some years I discovered I did not have enough time to do all the client development activities I listed. When that occurred I had to prioritize my activities.

Specifically you are planning where you expect to get your minimum billable hours, and more importantly, how you will spend your non-billable hours. I always planned to have 500 hours of non-billable time. I expected to spend 100 hours on administrative tasks. That leaves 400 hours a year to be divided between my own development and client development. Early in my career I spent more time on my own development, later in my career I spent more time on client development.

It is important to keep in mind that a plan is just that. In other words, during the year unexpected opportunities will arise. So, be willing to adjust your plan accordingly.

Invest in Your Clients

How can you best serve your clients and potential clients?

____

____

____

What do you need to know about your clients and potential clients, their business and industry to serve them better?

____

____

What should a 1-3 year associate learn about serving clients?
(Video Participant input - Learning how to practice law. Reaching out to senior lawyer.)

____

____

What should a 4-7 year associate learn about serving clients?
(Video Participant input – Building relationships internally. Keeping in contact with the person at your level in the client organization. Start listening to mentors, senior lawyers and see how they interact and build relationships with client.)

____

____

What should a partner learn about serving clients?

____

____

Goals

Why have written goals?

____

What are SMART goals?

S____

M____

A____

R____

T____

What are end result goals?

____

____

What are action goals?

What are the most important things to do to increase the likelihood of actually achieving your goals?

Module 3 Exercise

Develop Your Business Plan Duration: 20 minutes

The first step in developing a great business plan is to determine your major definite purpose, or stated a different way, the reason you are a lawyer.

1. Brainstorm Potential End Result Goals

Instructions: Begin by brainstorming potential goals. Think about:

- what you want to achieve,
- clients you want to serve,
- the type of work you want to do more of,
- what you want to experience, and
- what you want to learn.

Example

Potential Goal
Do a Blog
Increase my Matter origination by $300K
Generate more of my own work
Do more lender work

Potential Goal
Make equity partner
Work with clients who don't complain about my bills
Do more higher dollar transactions
Attend my child's school programs

Potential Goal

Potential Goal

2. Understand Which Goals Are Most Important and Why

After you have completed your list, think about and write down why each goal is important to you. When you answer, think about and write down why your answer is important to you. In other words seek to determine what is motivating you to achieve the goal. From your list, determine which goal is your major definite purpose/most important goal. Based on this understanding, decide which goals should be part of your plan.

From the prior page, select and write below your top 3 goals. For each goal, answer why it is important to you. If you do not have a good answer to the why question, then your goal will be like a New Year's resolution that you give up on achieving the first time there is a roadblock. You must have a good answer to the why question to motivate you, energize you and give you the discipline and commitment to achieve the goal. Finally, rank the priority of the goals.

Example:

End Result Goal	Why Important	Priority
Increase my Matter origination by $300K	Will give me more independence, increase probability of making partner	2
Make equity partner	Stability, more money, more freedom, status	3
Work with clients who don't complain about my bills	I will be happier, provide better service, less pressure, work with people who appreciate me	1

End Result Goal	Why Important	Priority

3. Develop Your Action Steps

Instructions: For each of the three end result goals determine the actions you must take to achieve the goal. For each goal, determine what action step you will take next week.

Example

End Result Goal	Action Goals	Next Action Item
Increase my Matter origination by $300K	Generate New Clients	Call Joe Smith at X Bank for lunch
	Market to Existing Clients	Identify key contacts for my 5 largest clients and set up a lunch schedule
	Start blog	Talk with Marketing re: firm resources for blog

End Result Goal	Action Goals	Next Action Item

End Result Goal	Action Goals	Next Action Item

Module 4 Build Your Profile / Writing

(Follow along as you watch the video)

Your reputation is shaped by ethical and professional conduct that requires <u>deliberate</u> attention to ways you can best serve your clients. Your deliberate effort to engage in the practice of law at the highest level includes:

- updating your skills continually
- skillfully using tools to plot out your life-long learning and career growth
- consciously revealing your skills, abilities, and character traits to current and potential clients through publications, speaking engagements and other communication.
- accessibility to your clients with the intention of knowing their needs and their industry well enough that you can help them achieve their goals and meet their needs

How can you demonstrate your professionalism? What vehicles can you use to: a) show your professionalism; b) demonstrate your command of industry challenges; and c) increase your visibility so your clients have realistic expectations of how you can meet their needs?

You have to be more visible and credible. Being visible and credible begins with having an effective website and professional bio. Other vehicles include being involved in bar associations and community service, writing and speaking.

Writing

Studies show that business clients expect lawyers to understand their industry. Writing gives your clients a glimpse of your grasp of their industry. It builds their confidence. It conveys the depth of your understanding of their challenges.

When writing consider Trey Ryder's approach – "19 Steps to Building a Nationwide Law Practice"

- Identify and explain target's problem
- Prove a problem exists
- Identify one or more solutions
- Prove the solution works
- Build yourself into the solution

In addition to the more traditional ways of distributing your content, such as through trade publications, social media provides a great opportunity. Blogging, tweeting, guides and eBooks allow for more timely and wider distribution of your content to the people who will find it valuable.

Module 4 Exercise
Your Website Bio Duration: 20 minutes

Your potential clients will review your website bio to help them decide whether to hire you. They look at your bio to see if you have experience handling the particular matter for which they are seeking help, whether you understand their industry and whether you understand their business.

Open your website bio. Then answer the following questions. Make changes and additions as appropriate. Add links to anything you want potential clients to be able to download:

What kind of clients are you trying to attract? ___________________________________

Does your bio reflect your knowledge of your target market's industry? ______________

Are your articles or other content downloadable? _______________________________

Are you happy with your photograph? ____

When was the last time you updated your bio? __________________________________

Does it accurately reflect your current practice? _________________________________

Since you last updated it, have you handled any significant matters?_______________

Have you written any significant articles? ______________________________________

If you are blogging, is there a link to your blog? ________________________________

Have you given any presentations? ____

Have you joined any community organizations or charities? _____________________

Have you taken any leadership positions in the Bar or community? _______________

What can you do to make your website / bio remarkable? _______________________

____

____

Action Steps (add these to your business plan)_________________________________

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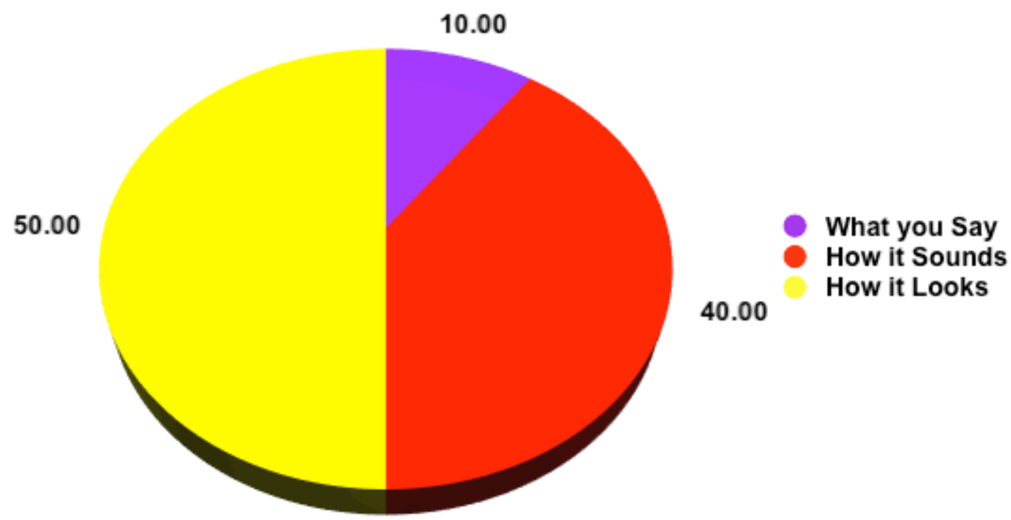
Module 5 Build Your Profile / Speaking

(Follow along as you watch the video)

When preparing to speak, think about who will be in the audience and speak to their business issues. Determine what your objective is: why you are doing the presentation and what do you want the audience to do as a result?

The Way Audiences Receive Your Message



Your Presentation as a Story or Stories

You may have read or heard that a presentation should tell a story rather than being filled with facts and law. In *Give Your Speech, Change the World,* Nick Morgan includes a chapter on the types of stories. There are three I believe apply to attorney presentations.

The most widely used story type is called Quest. In that type of story the hero sets forth to achieve a difficult goal. Along the way she encounters obstacles that she has to overcome to reach the goal. She may have a mentor who helps at crucial moments with wisdom or advice. The hero achieves the goal and then celebrates the victory.

For presentations about change, the Stranger in a Strange Land story fits. The hero is thrown into a new situation. She doesn't know the customs, rules and path. She is at a loss and confused. Once again she may encounter a mentor who helps her find her bearings.

The third type of story is Revenge. It is based on a hero who has a good enemy to conquer. There is wrong done to the hero who almost loses everything and then sets out to avenge the wrong.

When and Where

Establish the setting for the presentation. This relates the ‘where’ and ‘when’ for everyone in the audience.

Who

Designate the audience as the main character. This establishes the “who” of the story”.

Why

Describe a conflict involving the character. This explains “why” the audience is there - to solve the problem”.

What

Explain the audience’s desired state. This describes “what” the audience wants to see happen”.

How

Recommend a solution. This describes “how” the audience will get from their current state of imbalance to their desired state of balance.

The Structure of Your Presentation

How should you organize the content? Do not use the typical lawyer linear, chronological structure. Clients do not care abut the history of Swiss watch making. They just want to know the time.

How to Deliver Presentation

- Entertain! Get the audience involved by asking questions, or have them participate in an” icebreaker” activity.
- Humor: Be careful.
- Tell a story.
- Convey an emotion. The wider the spectrum of emotion, the better.
- Identify and solve your audience’s problem.
- Don’t write your presentation as you create your PowerPoint. Have a clear idea of what you plan to say and then create your PowerPoint.
- Your body language is really important. Practice in front of a camera, mirror or friend and work on posture, gestures and facial expressions.

How to Start Presentation

- You have 90 seconds during which the audience is deciding “what’s in this for me?”
- Ask a question.
- Or, give a startling statistic.
- After the first 90 Seconds, give a roadmap of the presentation. “The three things you need to know about _____are…”

How to Close Presentation

- Don’t rush, even if the speakers ahead of you ran into your time. Cut out something in the middle of your presentation.
- Don’t ask for questions at the end; ask for them right before you begin your closing.
- Give the audience a call to action. Ask them what they are going to do with this information.

What About NOT Using a PowerPoint?

- This is very effective because almost everyone uses them.
- If you do not use PowerPoint or any notes, to help you remember your points, provide copies of your outline to people you know in the audience. Have them raise their hand and ask a question if you skip a portion.

Follow Up:

It is important to find a way to follow up after the audience goes home. What could you do to follow up with your audience after the presentation?

____

____

Other than getting the members of the audience to hire you, what are your primary goals?

____

____

Presentation Mistakes

Over the years I have discovered that many, if not most, lawyers do not know how to make presentations that will result in new business. They make these mistakes:

1. They pick a topic that interests them rather than one that addresses the need of their audience.

2. They are unable to explain succinctly why the audience should be interested in their presentation.

3. They do not do research on their audience.

4. They do not rehearse/practice their presentation in advance.

5. They do not spend enough time in the actual room and with the IT staff to make sure everything is going to work.

6. They stand behind the podium, which blocks them from their audience.

7. They do not spend the first 90 seconds answering the most basic audience question: “What’s in this for me?”

8. They tell lame jokes that no one cares about.

9. They use their PowerPoint slides as a crutch, and even worse read what is on the slides.

10. They weakly close by asking if there are any questions or by saying: “in conclusion.”

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Module 5 Exercise

Getting Speaking Opportunities Duration: 20 minutes

Identify trade, industry and other potential client organizations for whom you would like to make a presentation. Then identify a potential topic for your presentation and explain why members of the organization would care about the topic.

Trade, industry or organization: ____

Potential topic: ____

Why members care:

____

____

Draft a letter to the organization's executive offering to speak and explaining why members of the organization will be interested in your topic.

____

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Module 6 Build Relationships / How Clients Select

(Follow along and answer the questions as you watch the video)

While the medical experts have long recognized that successful patient treatment begins with the physician's bedside manner, lawyers still have a long way to go. By simply learning the law governing your client's business, communicating the relevance to the client and displaying a knowledgeable, professional demeanor, a lawyer can separate him or herself from the pack. Most attorneys simply fail to realize that, in the client's eyes, the journey to a positive legal conclusion can be just as significant as the conclusion itself.

How Clients Select

Why do clients hire lawyers?

____

____

What client biases might you encounter?

____

____

What do clients expect from their attorneys?

____

____

Be insatiable in your efforts to understand the needs of your clients. Make sure everyone who helps you understands the importance of what they are doing for your clients.

What are the top three things you can do better to serve your clients?

____

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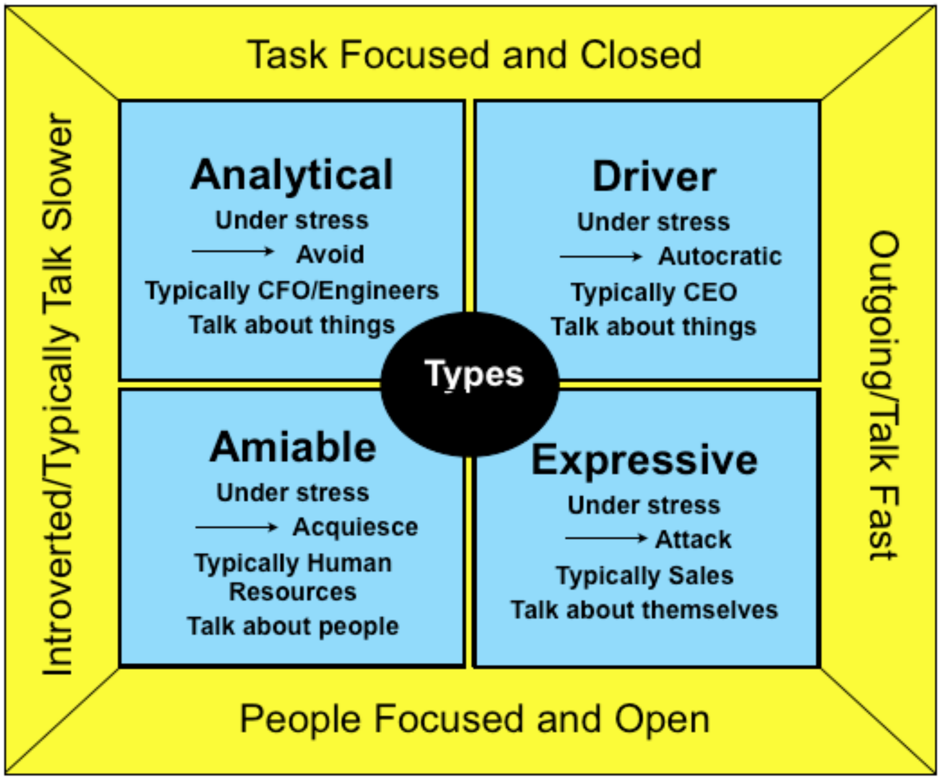
____

Module 6 Exercise
Client Learning Styles and Personality Types Duration: 15 minutes

Personality Types: Analytical; Driver; Amiable; Expressive



Building Rapport with Analytical	
You will have difficultly if you:	Instead you should:
• Are disorganized and casual • Are late • Push or coax • Talk about other clients • Are flippant or gimmicky • Only talk about the "big picture"	• Be well prepared • Get straight to business • Listen carefully • Be specific and logical when presenting legal work to be done • Pay attention to details • Be formal and unemotional when challenged

Building Rapport with Amiables	
You will have difficultly if you:	Instead you should:
• Get straight into services you offer • Keep the discussion focused on work all the time • Cause them to respond quickly • Dominate or control the conversation • Are rapid or abrupt • Keep offering opinions or increasing the complexity of the decision • Make wild claims • Are very factual	• Build a relationship • Spend time on personal talk before getting down to business • Ask open ended questions • Be alert for non verbal cues of dissatisfaction or disagreement • Be informal • Present what you are doing in a non-threatening way • Assure them whenever possible • Give your presentation the personal touch

Building Rapport with Driver	
You will have difficultly if you:	Instead you should:
• Waste their time • Are vague and rambling • Get too personal or try to get too close • Talk about yourself or your firm • Are disorganized • Stray from the purpose of the conversation • Ask irrelevant questions • Try to control the conversation • Don’t listen to what they are saying	• Get down to business quickly • Be specific in questioning • Use time efficiently • Provide alternatives for them to choose from • Be factual and succinct • Talk about results and outcomes of the litigation or deal • Avoid too much detail • When business is finished – leave

Building Rapport with Expressive	
You will have difficultly if you:	Instead you should:
• Control the conversation • Don't listen to what they are saying • Are impatient • Put too much detail into the presentation • Don't tie them down there and get a decision • Socialize so much that you never get to the purpose of your visit • Patronize or dig your heels in	• Let them share what is on their mind before getting to business • Talk about opinions and other people • Let them know you appreciate them • Be enthusiastic and energetic • Be fast paced • Let them know the results you hope to achieve in the litigation or deal • Make them look good

Learning Styles: Visual, Aural, and Kinesthetic.

Style	How they learn	Communication
Visual	Shown	"I see what you mean"
Aural	Told	"I hear what you're saying"
Kinesthetic	Experience	"I feel …"

By now you have received an introduction to personality and learning style analysis. What is your personality type and learning style?

Personality Type: Analytical ☐ Driver ☐ Amiable ☐ Expressive ☐

Learning Style: Visual ☐ Aural ☐ Kinesthetic ☐

Think of three clients you know well. What is your best guess as to their personality type and learning style? As you interact with them over the next several months, listen carefully and reassess, if needed.

Client 1: ____

Personality Type: Analytical ☐ Driver ☐ Amiable ☐ Expressive ☐

Learning Style: Visual ☐ Aural ☐ Kinesthetic ☐

As you think about your personality type and learning style as well as that of your client, what is the most effective way to communicate?

____

____

Based on this assessment how should you adapt your business plan, if at all, for this client?

____

____

Client 2: ____

Personality Type: **Analytical ☐** **Driver ☐** **Amiable ☐** **Expressive ☐**

Learning Style: Visual ☐ Aural ☐ Kinesthetic ☐

As you think about your personality type and learning style as well as that of your client, what is the most effective way to communicate?

____

____

Based on this assessment how should you adapt your business plan, if at all, for this client?

____

____

Client 3: ____

Personality Type: **Analytical** ☐ **Driver** ☐ **Amiable** ☐ **Expressive** ☐

Learning Style: Visual ☐ Aural ☐ Kinesthetic ☐

As you think about your personality type and learning style as well as that of your client, what is the most effective way to communicate?

____

____

Based on this assessment how should you adapt your business plan, if at all, for this client?

____

____

Appendix A

Client Development Self-Assessment
Where Are You Now?

Make a note to complete this assessment six weeks after completing this program. Compare yourself to the pretest you took at the beginning of this workbook.

1. Think back to what you wanted to achieve before you started this program, on a scale of 1-10 grade yourself.

1-3 Totally Lost	4-7 Midpoint 50/50	8-10 Totally "Get It"
Don't have any clue where to start or what to do	Have some idea of what to do, but need to improve	Have a game plan and am implementing it with great success

My Self- Assessment is ____________

2. What did you want to accomplish that you didn't?

____

____

____

3. What did you learn about client development?

____

____

____

4. What have you learned about yourself?

____

____

____

5. How will you apply what you have learned about client development and about yourself in the future?

6. What would you like to accomplish on client development over the next year?

7. What would you like to accomplish on client development in the next 90 Days?

		Yes	No
8.	Do you have a written plan for this year?		
9.	Do you have written goals for what you want to achieve this year?		
10.	Do you plan each and every week what your CD activities are going to be?		
11.	Do you have a system to stay in contact with your contacts or is it random?		
12.	Do you regularly visit your clients at their office without charging them?		
13.	When you see an article, book, seminar or workshop that you think would be valuable to your client, do you send it to them?		
14.	When you finish a project what do you do to get feedback from your client?		

15.	When you are visiting with clients what is the ratio of questions you are asking vs. statements you are making?		
16.	Are you reading your client's trade publications?		
17.	Do you belong to the associations or industry organizations your clients belong to?		
18.	Do you personally know your client representatives, their assistant, their spouse, how many children they have, what their interest are? What are you doing to get to personally know them?		
	Total		

Total Self- Assessment is ____________

Appendix B

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. Under Roman Numeral III, there is 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.

BUSINESS DEVELOPMENT GOALS FOR THIS YEAR

Describe briefly your three or four business development goals. 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

Billable Hours ________

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)	
Pro Bono (Section VI)	

Total Billable and Non-Billable Hours:_________

III. PROFILE BUILDING

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.

A. Professional/Bar Organizations

Name of Organization	Membership Composition	My Activity/ Role		

Estimated number of hours: ____________

B. Community, Civic, Political or Charitable organizations

Name of Organization	Membership Composition	My Activity/ Role			

Estimated number of hours: ____________

C. Trade and Industry Associations

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

Estimated number of hours: ____________

D. Books, articles and other writing for publication:

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: _____

VI. PRO BONO

A. Activity: ____
____
____

Location: ____

Estimated number of hours: _____

Congratulations on completing your Attorney Business Plan! Now go out and execute!

Appendix C
Internet Resources

Cordell's Blog – http://www.cordellblog.com/

Cindy's Blog – http://www.professionaldevelopmentperspectives.com/

Seth Godin – http://www.sethgodin.com/sg/

Google Alerts –
http://www.google.com/support/alerts/bin/static.py?hl=en&page=guide.cs&guide=28413&rd=1

Toastmasters International - http://www.toastmasters.org/

RECOMMENDED READING

Being a Lawyer

"True Professionalism" by David Maister
"Lawyer Life" by Carl Horn
"Transforming Practices" by Steven Keeva
"How to Argue and Win Every Time" by Gerry Spence

Business

"Built to Last: Successful Habits of Visionary Companies" by Jim Collins & Jerry Porras
"Good to Great: Why Some Companies Make the Leap….and Others Don't" by Jim Collins
"Gung Ho" by Ken Blanchard & Sheldon Bowles
"The Innovation Secrets of Steve Jobs" by Camine Gallo
"Jack Welch and the GE Way" by Robert Slater
"Raving Fans" by Ken Blanchard & Sheldon Bowles
"The Four Obsessions of an Extraordinary Executive" by Patrick Lencioni

Business Development

"Clients for Life" by Jagdish N. Sheth and Andrew Sobel
"Creating Customer Evangelists" by Jackie Huba and Guy Kawasaki
"Making Rain: The Secrets of Building Lifelong Client Loyalty" by Andrew Sobel
"The Trusted Advisor" by David Maister, Charles Green & Robert M. Galford

Interpersonal Skills

"How to Work a Room: The Ultimate Guide to savvy Socializing in Person and Online" by Susan RoAne
"How to Connect in Business in 90 Seconds or Less" by Nicholas Boothman
"How to Talk to Anyone: 92 Little Tricks for Big Success in Relationships" by Leil Lowades
"Never Eat Alone" by Keith Ferrazzi
"Likeability Factor" by Tim Sanders

Leadership

"Aligning the Stars" by Jay Lorsch & Thomas Tierney
"Beyond Success" by Brian Biro & John Wooden
"Drive" by David H. Pink
"First Among Equals" by Patrick McKenna & David Maister
"It Takes a Team" by Cordell Parvin & Brice Voran
"The Leadership Challenge" by James M. Kouzes and Barry Z. Posner
"The Leadership Engine" by Noel Tichy with Eli Cohen
"Leadership From The Inside Out" by Kevin Cashman
"Leading With the Heart" by Mike Krzyzewski
"Managing the Professional Service Firm" by David Maister
"Principle-Centered Leadership" by Stephen Covey

Life

"The 7 Habits of Highly Effective People" by Stephen Covey
"First Things First" by Stephen Covey, Roger Merrill & Rebecca Merrill
"Getting Things Done" by David Allen
"Goals" by Brian Tracy
"Man's Search for Meaning" by Viktor E. Frankel
"Overachievement" by John Eliot, Ph.D.
"The Power of Full Engagement" by Jim Loehr and Tony Schwartz
"The Power of Purpose" by Richard J. Leider
"The Ultimate Guide to Mental Toughness" by Daniel Teitelbaum

Emotional Intelligence/Personality Profiles

"Emotional Intelligence" by Daniel Goleman
"Emotional Intelligence at Work" by Hendrie Weisinger, Ph.D.
"Selling with Emotional Intelligence" by Mitch Anthony
"StrengthsFinder 2.0" by Tom Rath

Marketing and Sales

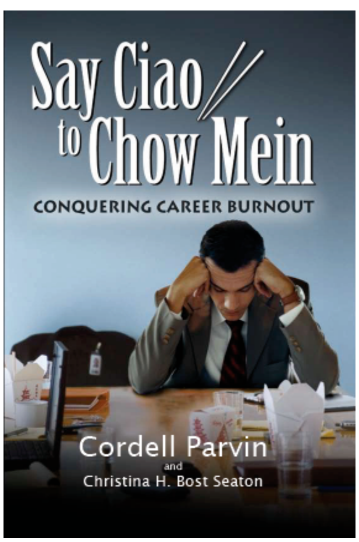
"The Dip" by Seth Godin
"Heavy Hitter Selling" by Steve W. Martin
"High Trust Selling" by Todd Duncan
"Lynchpin: Are You Indispensable?" by Seth Godin
"Made to Stick" by Chip Heath & Dan Heath
"The Sales Bible" by Jeffrey H. Gitomer
"Selling with Emotional Intelligence" by Mitch Anthony
"Spin Selling" by Neil Rackham
"The Tipping Point" by Malcolm Gladwell
"Trust-Based Selling" by Charles H. Green
"Word of Mouth Marketing" by Andy Sernovitz
"You, Inc." by Harry Beckwith and Christine Clifford Beckwith

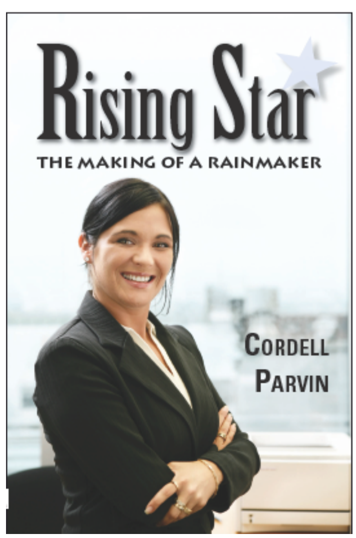
Presentation Skills

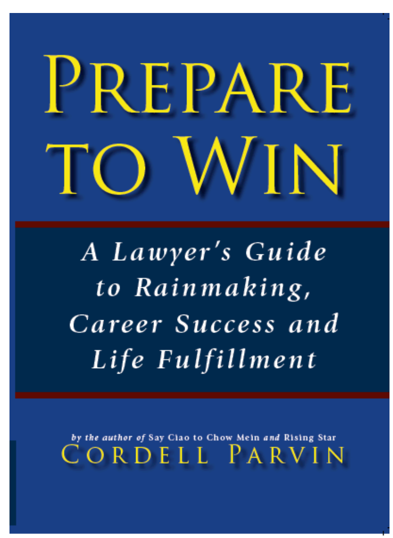
"10 Simple Secrets of the World's Greatest Business Communications" by Carmine Gallo
"Beyond Bullet Points" by Cliff Atkinson
"Presenting to Win: The Art of Telling Your Story" by Jerry Weissman

Social Media

"The Anatomy of Buzz Revisited" by Emanuel Rosen
"Crush It" by Gary Vaynerchuk
"Facebook Marketing: Designing Your Next Marketing Campaign" by Justin R. Levy
"Groundswell: Winning in a World Transformed by Social Technologies" by Charlene Li and Josh Bernof
"The New Community Rules: Marketing on the Social Web" by Tamar Weinberg
"The New Rules of Marketing and PR" by David Meerman Scott
"World Wide Rave" by David Meerman Scott







Available at: http://cordellparvin.com