

Annual Attorney Business Plan

Overall Business Goals

Your goals should be specific, measurable, and achievable. You want to create benchmarks that will allow you to measure your wins and hold yourself accountable.

1. Identify your ideal client.
 - a.
 - b.
 - c.
2. Identify your ideal referral source.
 - a.
 - b.
 - c.
3. How many hours per week will you devote to marketing activities? _____
4. Identify four articles of interest to your clients and referral sources that you will publish (one per quarter).
 - a.
 - b.
 - c.
 - d.
5. How many networking events will you attend? _____ Per month? _____
6. How many new clients will you generate? _____ Per month? _____
7. How much will you increase your prior year's revenue by? _____ Per quarter?

8. Identify and join at least one new association or networking group you will join.
 - a.
9. How many professional marketing books will you read? _____
10. How often will you post original content on social media? _____
 - a. Per month?

Finding New Prospects

Obtaining new clients is essential to staying productive. Identify three potential new clients, specify what you can offer them, and how you will go about connecting with them.

Prospect #1

Name _____

Describe action(s) to be taken:

Anticipated Completion Date: _____

Prospect #2

Name _____

Describe action(s) to be taken:

Anticipated Completion Date: _____

Prospect #3

Name _____

Describe action(s) to be taken:

Anticipated Completion Date: _____

Existing Clients

Identify existing clients with whom you can get to know better and grow your relationship. How might you and the client benefit in this way? This might include making beneficial introductions for the client, meeting with them to better understand their business, and referring them business. Be as detailed as possible.

Client #1

Name _____

Describe action(s) to be taken:

Anticipated Completion Date: _____

Client #2

Name _____

Describe action(s) to be taken:

Anticipated Completion Date: _____

Client #3

Name _____

Describe action(s) to be taken:

Anticipated Completion Date: _____

Target Referral Sources

Which contacts will you focus on that understand or are willing to learn the types of problems you can solve so that, when they run into a prospective client, they think of you. Referral sources can include other attorneys, former or existing clients, and others you know. Consider how you can demonstrate and communicate the breadth of your knowledge and skill set. Expand this list as needed.

Contact #1

Name _____

Company _____

Describe action(s) to be taken:

Anticipated Completion Date: _____

Contact #2

Name _____

Company _____

Describe action(s) to be taken:

Anticipated Completion Date: _____

Contact #3

Name _____

Company _____

Describe action(s) to be taken:

Anticipated Completion Date: _____

Education and Learning

Continuing Education can be essential, especially in the legal field as court cases on the state and national level can yield changes to your practice and how you help others. Not only should you seek to educate yourself, but also you should be identifying ways to educate referral sources and existing and potential clients.

What do you plan to learn this year? These can be legal precedents, specific cases, new fields of study, new developments in your existing areas of practice, and more.

1. _____
2. _____
3. _____