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**MY INDIVIDUAL  
PLAN CONTRACT**

**Name:** \_\_\_\_\_

**Department:** \_\_\_\_\_

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**1. Clients:** In the next 100 days, I will focus on increasing the Firm's involvement with the following existing clients of the Firm (list clients and indicate the type of contact you will make with each client):

a. \_\_\_\_\_ b. \_\_\_\_\_

c. \_\_\_\_\_ d. \_\_\_\_\_

**2. Prospects:** In the next 100 days, I will initiate contact with the following organizations who are NOT currently clients of the Firm (list prospects and indicate the type of contact you will make):

a. \_\_\_\_\_ b. \_\_\_\_\_

c. \_\_\_\_\_ d. \_\_\_\_\_

**3. Meetings:** I anticipate having the following new business meetings (face-to-face meetings with potential buyers) during the next 100 days (list):

Current Clients

Prospects

**4. Positioning:** In the next 100 days, I will conduct the following "positioning broadcasting" business development activities (speeches, articles, seminars, mailings—general passive marketing activities):

**5. Proposals:** I anticipate developing the following proposals for [FIRM] services during the next 100 days:

**6. Other:** I will conduct the following "other" business development activities during the next 100 days:

**7. Hours:** I will devote \_\_\_\_\_ hours per week to business development during next 100 days.

**8. Evaluation:** The ways I will evaluate my business development efforts after 100 days will include:

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**SIGNATURE::** \_\_\_\_\_

**DATE:** \_\_\_\_\_



**Confidential**

Print Name \_\_\_\_\_

Date \_\_\_\_\_

Please fill out this form *completely* and **print clearly**.

## INDIVIDUAL ATTORNEY MARKETING PLAN

### I. Developing Your Network and Reputation

Clients perceive professional activities like writing, speaking, and bar- and industry-association activities as indications of your knowledge and skill. Ensure that clients know about your activities.

#### A. Networking

Networking is the foundation of client development (no network = no clients). “If you want to hunt elephants, find out where they gather. Then go there.” Build a network of the *right* contacts. After a thorough introspective analysis, *precisely* identify the most likely sources of new business for the practice you are trying to develop — your “target audience.” Next, find out which industry or trade associations they belong to and which meetings they attend. Then join those organizations and work toward a leadership position. You can’t get business if the people who hand out the business don’t know, trust, and respect you. I will join **and activity participate** as a member of (pick two or three, including existing commitments):

**Industry or Trade Association(s)** (In which industry will you develop contacts?)

\_\_\_\_\_  
\_\_\_\_\_

**Bar Association(s)**

**Section and Committee**

\_\_\_\_\_  
\_\_\_\_\_

**Social, Civic, or Community Organization(s)** (e.g. country club, chamber of commerce)

\_\_\_\_\_  
\_\_\_\_\_

#### B. Supporting Activities

Certain activities support the firm’s selling of our services. Some of these are included below. (Select a *total* of 3 of the 6.)

- I will regularly **update my mailing list**.
- I will regularly **update my biography**.
- I will write **one short article** this year -- easy-to-read, non-scholarly, and industry-oriented.
- I will help develop or update **written promotional materials** (e.g. brochures) targeting the following department, practice area or industry: \_\_\_\_\_
- I will create/update a list of **representative transactions** or case summaries.
- Other, describe below: \_\_\_\_\_



## II. Developing Existing Client And Prospect Relationships

To survive, a firm must maintain and expand existing relationships as well as obtain new clients.

### A. Strengthening and Expanding *Existing* Client Relationships

**80%** of an organization's new business comes from the top **20%** of its clients. The Firm is committed to retaining, enhancing, and expanding these top relationships. The primary focus is to continue learning more about their businesses and industries, strategic business goals, and legal needs so that we can provide more informed and useful legal counsel. An added benefit of this enhanced understanding is that it positions us to identify new business opportunities. As the General Counsel of a Fortune 500 company said, "If you're not willing to take the time to learn about me, you do not really want my business." List below the **3 current clients** you will focus on to strengthen our firm's relationship.

1. Existing Client's Name: \_\_\_\_\_

**Company Research.** I recognize how important it is to have regularly updated information about our clients. To learn more about their company and industry so that I can serve them better, I will thoroughly review the company's web site. I also would like the Library to send me informational materials and articles on this company and send an additional copy to the following Firm attorney(s): \_\_\_\_\_

**Client Visit. *Within 6 weeks*,** I will volunteer to visit the client's facility, at no charge, simply to learn more about them and invest in the relationship, so that I can understand the business and industry better and enhance the service we provide. I will tour the factory/office at every opportunity, and meet their key people and managers. **I will not market** our services to them during this visit in any way. Instead I will learn about its people, products, and plans.

**Attend Trade Conference. *This year*,** I will go with the client to his/her trade association meeting/conference at no charge, to learn more about his/her business and industry.

**Read Industry Periodicals. *Within 2 weeks*,** I will subscribe to -- and read -- the client's industry or trade association magazine(s) at no charge, to learn more about his/her business, industry and jargon. I understand that the client would be delighted to learn of my interest and would be happy to tell me which publications are the best.

**Make Conference Speech. *This year*,** I will arrange to speak at the association's next conference on a topic of particular relevance to this industry, co-presenting with a client if possible.

**Attend Client Meetings. *This month and every 2 months thereafter*,** I will offer to attend the client's internal meetings, at no charge, to learn more about them, and offer advice regarding how to accomplish its goals and plans.

**Entertain Client. *Every two months*,** I will entertain this client for lunch, dinners, special events etc.

**Send Clippings. *Regularly*,** I will send useful clippings on relevant business developments.

**Present In-House Seminar.** I will offer to conduct a free in-house seminar on a useful topic.

**Add to Mailing List.** I will ensure that this client is added to our mailing list



2. Existing Client's Name: \_\_\_\_\_

- I will carefully review the client's **web site**, especially the What's New section.
- I will **visit** the client's premises within 6 weeks.
- I will attend trade **association meetings** this year.
- I will subscribe to (and read) the industry **trade journal** within 2 weeks.
- I will **co-author** with a client a short, industry-focused article this year.
- I will seek to **co-present** with a client an industry association speech this year.
- I will volunteer to attend the client's **internal meetings** every 2 months.
- I will **entertain** this client every 2 months.
- I will seek opportunities to use the client's **products** and do business with this client.

3. Existing Client's Name: \_\_\_\_\_

- I will carefully review the client's **web site**, especially the What's New section.
- I will **visit** the client's premises within 6 weeks.
- I will attend trade **association meetings** this year.
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## B. New-Client Development

Although it is a less efficient way of bringing in new business, developing new clients is important to our continuing vitality. List below 2-3 non-client targets you will seek to develop business from during the coming year, and the activities you will undertake to accomplish this.

1. Prospect's Name: \_\_\_\_\_

- I will carefully review the prospect's **web site**, especially the What's New section.
- I will offer to **visit** the prospect's premises within 6 weeks.
- I will attend trade **association meetings** this year.
- I will subscribe to (and read) the industry **trade journal** within 2 weeks.
- I will **co-author** with a prospect a short, industry-focused article this year.
- I will seek to **co-present** with a prospect an industry association speech this year.
- I will volunteer to attend the prospect's **internal meetings** every 2 months.
- I will **entertain** this prospect every 2 months.
- I will seek opportunities to use the prospect's **products** and do business with this prospect.



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III. Miscellaneous

**Other Ideas**

Please list below any other ideas you have (individual or institutional) for marketing or selling to existing or prospective clients:

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**Any Other Thoughts?**

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**Ross Fishman Marketing, Inc.**  
**NICHE/INDUSTRY MARKETING CHECKLIST**

We are seeking to identify one or more narrow niches in which, if effectively marketed, we could build a successful, focused practice. *Where can we become market leaders?* This form seeks your thoughts regarding places we might start.

Please consider narrow market segments, target communities, geographic regions, sub-practice specialties, areas of narrow expertise and/or specific industries -- *not* broad, traditional headings like Health Care, Real Estate, Insurance, Construction, or Financial Services. In what niche do we have the threshold level of expertise and limited law firm competition? We appreciate your input.

1. What *narrow* niche or industry should we consider targeting? \_\_\_\_\_
2. Identify the Firm lawyers who have experience in the target area. \_\_\_\_\_  
\_\_\_\_\_
3. Briefly describe the Firm's existing expertise for this niche or industry. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. Identify one or more existing clients in the targeted area. \_\_\_\_\_  
\_\_\_\_\_
5. Identify the best trade associations or similar organizations serving the target area, if you know. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
6. Identify any law firm(s) who would be our primary competitors. \_\_\_\_\_  
\_\_\_\_\_
7. How might the Firm distinguish itself from competing law firms in those areas? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
8. Your name. \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_



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1. Department: \_\_\_\_\_
2. Niche or Industry Target: \_\_\_\_\_
3. Identify the existing expertise in the department for the niche or industry: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. Identify the lawyers in the department who would be involved in marketing or providing services to the targeted niche or industry: \_\_\_\_\_  
\_\_\_\_\_
5. Identify other areas of expertise that exist (or could be developed) in other departments to provide services to the targeted niche or industry: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
6. Identify lawyers in other departments who would be involved in marketing or providing services to the targeted niche or industry: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
7. Identify existing firm clients in the targeted niche or industry: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
8. Identify potential new clients in the targeted niche or industry: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



9. Identify the partner(s) who would take primary responsibility for the development, implementation and success of the marketing plan for the targeted niche or industry: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
10. Identify the trade associations or similar organizations servicing the targeted area: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
11. Identify any specific geographic focus for marketing to the targeted area: \_\_\_\_\_  
\_\_\_\_\_
12. Identify other law firms who would be primary competitors in the targeted niche or industry:  
\_\_\_\_\_  
\_\_\_\_\_
13. How can the Firm distinguish itself from other law firms servicing the targeted area? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
14. Highlight some specifics of the marketing plan contemplated for the targeted area:
- (a) Research: \_\_\_\_\_
  - (b) Networking: \_\_\_\_\_
  - (c) Brochures: \_\_\_\_\_
  - (d) Speeches: \_\_\_\_\_
  - (e) Articles: \_\_\_\_\_
  - (f) Web Site: \_\_\_\_\_
  - (g) Advertising: \_\_\_\_\_
  - (h) Other: \_\_\_\_\_
15. How can the Firm's marketing department help develop and implement the marketing plan?  
\_\_\_\_\_  
\_\_\_\_\_
16. Your name. \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_