

Individual lawyer marketing plan

Name: _____

Date: _____

External activities

Activities I will personally undertake to accomplish in the next year in the following categories:

Memberships

I will become an active member in:

Professional associations

•

•

•

Business or community organisations

•

•

•

Leadership

I will work towards serving in a leadership position in the following:

Association/Organisation

Position desired/attained

Target date

•

•

•

•

•

•

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Seminars and presentations

I will participate in these in-firm or external seminars, as a speaker:

Seminar topic	Target audience	Target date
•	•	•
•	•	•
•	•	•

Articles

I will prepare the following articles as a primary author or co-author:

Topic	Target audience	Target date
•	•	•
•	•	•
•	•	•

Personal development

I will undertake the following activities to help me develop my personal skills and level of professionalism:

CLE

-
-
-

Teaching or lecturing opportunities

-
-
-

Other

-
-
-

Business development activities

Client development and retention

Established clients who I will focus on retaining and developing:

Client	Client contact
•	•
•	•
•	•
•	•
•	•
•	•
•	•
•	•

Client visits

Clients who would be appropriate targets for inviting to our offices for a presentation about their businesses to our lawyers:

-
-
-
-
-

Clients who would be appropriate targets for a group of lawyers to visit and make a presentation to, on a timely issues of interest or concern:

-
-
-
-
-

Cross-selling

Established clients that I will introduce to another area in the firm for cross-selling purposes:

Client	Lawyer	Objective
•	•	•
•	•	•
•	•	•
•	•	•
•	•	•

Prospective clients and referrals

Prospective clients or referral sources who I will follow up with a view to developing business:

Prospective client or referral source	Activity
•	•
•	•
•	•
•	•
•	•
•	•
•	•

New business development

Target prospective clients I will seek to develop new business with during this year:

Target prospect	Type of legal work	Activity
•	•	•
•	•	•
•	•	•
•	•	•
•	•	•

Profitability and productivity

Goals for this year	Hours	Detail or description
Projected billable hours	_____	_____
Projected marketing hours	_____	_____
Projected management hours	_____	_____
Projected other hours (describe)	_____	_____
Current billing rate(s)	_____	_____
% of write-offs	_____	_____
Supervision of workgroup	_____	_____
Projected revenue	_____	_____
Other		