Business Development Checklist

Use this checklist to build on your strengths, leverage what is working and minimize areas to improve. Align your actions with your long-term goals.

Focus on 1 or 2 actions at a time depending on your time frame. Record your progress.

□ **Build relationships with your referral sources**

□ Review referrals from the last 1-4 weeks.

□ Identify who you want to follow up with from your referral list.

□ Make 1-3 meaningful contacts with referral sources per week. *See attached sheet.*

□ **Grow relationships with your professional network** .

□ Identify what committee/organization you want to get involved in. Make the call to learn more.

□ Review your professional network, including professionals who serve your target client, legal network, people you met at recent networking events. Decide which professional

relationships you want to strengthen.

□ Make 1-3 meaningful contacts with your professional network per week. *See attached sheet.*

□ **Nurture relationships with selected former clients**

□ Review list of cases you recently closed. Identify who you want to follow up with from client list. □ Make 1-3 meaningful contacts with former clients per week.

Notes:

1 of 2

Business Development Checklist Continued

□ **Build your online reputation**

□ Strengthen your online profile. Why should clients choose you?

□ Write an article or content that aligns with your brand.

□ Post an article on LinkedIn, twitter & Facebook.

□ **Strengthen your thought leadership**

□ Research opportunities to give a presentation or talk on your area of expertise.

□ Outline a series of blog posts on your area of expertise.

□ Explore opportunities to train and teach on your topic of expertise. Send an e-mail to the person.

□ **Review your quarterly results**

□ Number of client consulted.

□ Number of new/increased referrals.

□ New cases aligned with your areas of strengths and interests. □ Financial targets.

Notes:

2 of 2

Examples of Meaningful Contacts

Build Your Professional Network

• Send a hand-written note (birthday, congratulations, new baby, etc.)

• Send an invitation to join your LinkedIn network.

.)

• Review your LinkedIn feed to stay informed about your network’s businesses.

• Interact with your professional network through social media.

• Comment on a relevant post, acknowledge work accolades and like, share or re-tweet their posts.

• Send a referral.

• Invite someone in your network to a professional or social event.

• Send an e-mail or card acknowledging a promotion or award.

• Make an introduction to a colleague at your firm or someone in your professional network.

- Put them in touch with someone who they would benefit meeting.

• Write a recommendation on LinkedIn.

• Write a blog and include a quote from someone in your network.

• Send an e-mail checking in or make a call and invite them to lunch.

• Create a system for ensuring every referral source receives a thank you letter every time they refer a client to you. Use your business development time to write a personal note.

• Send an e-mail to your network wishing them a happy holiday. Include a personal note specific to each professional.

• Research and schedule a networking event to attend in the next month.

• Pay attention and respond to invitations you receive from your network.

- If possible schedule time to attend an event.

• Schedule a meeting to share information on the services you provide.

- Make it interesting with stories that reflect your expertise. - Create value for the participants through substantive information on

your area of law. Strengthen Client Referrals

• Call select former client 2-4 weeks after case closes to check in.

• Recognize what resources your clients will need. Recommend a professional in your network to help solve your client’s problem.

• Consider sending a book/gift/card thanking client after a case closes.

• Connect with selected clients on social media to stay informed on what is happening in their life.

• Ask a former client to lunch/co ee to stay top of mind.

• Send a client evaluation after the case closes.

• Send an e-mail on holidays with a personal note.

• Send a relevant article.

• Personalize your outreach to former clients by maintaining a data base of their birthdates, children’s names and ages and other relevant information.

Build Your Thought Leadership

• Review your online lawyer profile. Communicate what sets you apart.

- What differentiates you? What is your specialization?

• Review your LinkedIn connections. Go through your contacts and make sure everyone on your list is someone who you either want to learn more about or you want to see your updates. Delete old connections.

• Spend 10 minutes reviewing your LinkedIn network.

- Like or share 1-2 relevant posts from your network. - Focus on the content from your top referral sources.

• Post a relevant article on your blog or social media platform that you have read and closely aligns with your brand. Consider the following content:

- News about your law firm services, awards or lawyer spotlights - Post from referral network, acknowledging their accolades - Tips or advice relevant to your target market, ie. recent blog posts

addressing a certain problem your clients face.

• Reach out to one referral source to collaborate on a blog.

• Review your firm's online reputation.

- Take 5-10 minutes to monitor your reviews on major online sites

inlcuding Facebook, Yelp and Google.

• Reach out to one satisfied client and ask to submit a review about their positive experience working with you.

• Brainstorm blog post ideas on solutions for your target clients’ key concerns or problems. Ensure the topic is narrow and relevant.

• Brainstorm ways to communicate your expertise.

- What topics are you passionate about? - What are possible events you could speak at? - Write down a list of ideal speaking engagements or publications with

ideas on various topics.