Secrets of the Masters:
The Business Development Guide for Lawyers

DAVID H. FREEMAN, J.D.

Praise for *Secrets of the Masters* and David H. Freeman, J.D.

“David Freeman has a deep understanding of today’s competitive legal services industry, and knows how to teach busy practitioners how to compete and win. Secrets of the Masters is a robust compilation of his thinking, supplemented by the wisdom and experience of more than two dozen top-flight legal and marketing experts. I highly recommend David to any organization looking to grow its business, and believe any lawyer looking to build their practice should have a dog-eared copy of this report on their bookshelf.” **Peter Kellett, Chairman and CEO, Dykema**

“David’s approach emphasizes action – and this report brings together subject experts with practical tactics that give attorneys the foundation they need to realize their potential as business developers. I value David’s insight and guidance, and I’d recommend this report to anyone who wants to transform their business development culture.” **Betsy Beorn Spellman, CMO, Steptoe & Johnson PLLC**

“This report contains the kind of excellent advice David Freeman provided to us on strategic planning, and client and leadership development initiatives. It is a comprehensive treasure trove of some of the best approaches for building a practice, and I think lawyers will especially appreciate the practical case studies provided throughout this work. His call to action at the end of each chapter is the key to success. Lawyers wanting to be great rainmakers will find Secrets of the Masters an invaluable resource.” **Rhea F. Law, CEO and Chair of the Board, Fowler White Boggs P.A.**

“David worked with us on one of our practice group retreats and it was my first introduction to him. I was impressed with his broad business development knowledge but particularly with his abiltiy to generate interaction and discussion with our lawyers, so I brought him back several times to conduct additional business development training sessions. The feedback from his programs has been exceptional, and I look forward to finding more opportunities to utilize his skills in other areas of the firm." **Jolene Overbeck, Chief Marketing Officer, Hogan Lovells LLP**

"David teaches partners that the most important part of business development is following through. David helped our laterals to understand that the best source of referrals is found in the office next door and with each one of their partners." **Timothy E. Hoeffner, partner, DLA Piper LLP**

"Once I met David, my business development really took off. David helped me think outside the box while also focusing me on my business plan. Most importantly, he helped me set realistic short-term goals and encouragingly pushed me until I achieved them ... just three years after joining the firm, starting with virtually no clients, I became a partner with a thriving seven-figure practice. David was certainly a key player in that success." **Andrew J. Lauer, Esq., former partner, Thelen Reid Brown Raysman & Steiner LLP**

"David Freeman was one of the best [business development consultants] we've ever used. His nuanced understanding of how to help lawyers provide better levels of service and grow their practices was outstanding, and his coaching was extremely well received by our lawyers. Lawyers relate to David not just because he was a licensed attorney, but because he applies a realistic, down-to-earth, and practical approach to the subject." **Thomas W. Turner, Jr. Managing Partner, Procopio**

"David gave me career-altering advice and provided me with confidence and direction that has produced startling results in a very short time. My work with David has already paid off 100x! Clearly an excellent investment with immediate results!" **T. Anthony Jaye, Esq.**

"David worked with my firm leadership and coached individual lawyers to maximize their business development potential. Three years later, I still hear David's wisdom from the mouths of those he coached at the firm. His ability to meet each lawyer where they are, and then move them toward more sophisticated, strategic thinking is truly his gift ... David is honest, candid, and motivational. Our firm has benefitted greatly from the work we did with him." **Holly Lentz Kleeman, Director of Marketing, White and Williams LLP**

“Lawyers listen to David. He helps them see that business development is not necessarily scary or antithetical to being a lawyer: it’s a skill to be learned and practiced. **James G. Staples, Chief Marketing Officer, Miles & Stockbridge**

“A dynamic and engaging presenter, David Freeman adapts his experience and knowledge to the unique and deeply specific needs of his audience, providing relevant, practical, and personalized business development approaches that can be immediately applied. It is truly an outstanding moment when I meet a consultant who walks the walk, and David presented me with that moment.” **Cindy Hayes, J.D., Director of Attorney Training and Development, Norton Rose Fulbright**

“David Freeman helped me think through ways I could best utilize contacts made with private industry during my tenure with the government. He understood the sensitivities involved with the transition and was mindful of delicate issues. While landing clients ultimately depends on good old-fashioned hard work, David helped me focus my time and efforts on marketing techniques that had the highest likelihood of success. The training has proven successful for me. Best of all, David understands that marketing should be fun and invigorating.” **David Zambito, Esq., Office Managing Partner, Harrisburg PA office, Cozen O’Connor**

“I had the opportunity to see the impact of David’s work at one of my prior firms, and recommended that he be engaged by two other firms I subsequently joined. As a COO who is responsible for maximizing financial results, David has proven to be an asset who has shown our lawyers how to confidently and effectively pursue their best opportunities.” **Richard Wolf, COO, Parker Poe LLP**

“Since working with David, my firm had the second, third, and fourth largest billing months in our history. David has been a treasure-trove of ideas for helping me grow my practice, and I would highly recommend his work to any lawyer who wants to take their practice to the next level.” **Rick Angel, Esq. Angel Law Offices**

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Executive summary

"To give anything less than your best is to sacrifice the gift."

Steve Prefontaine, renowned U.S. middle and long distance runner

You know what it takes to become a great lawyer, but do you know how to become a great rainmaker? You already possess the necessary ingredients – knowledge, intelligence, discipline, and work ethic – and you understand the virtues of delayed gratification. By applying these existing capabilities into the realm of business development, you can give yourself the gift of building an exceptional book of business.

Secrets of the Masters: The Business Development Guide for Lawyers uncovers the mysteries of becoming an extraordinary rainmaker. We start with an assumption – you're a technically good lawyer who delivers solid legal results. We build from there by giving you hundreds of proven tools and techniques for increasing revenue and forging relationships with clients and colleagues that can last a lifetime.

To that end, I've assembled an All-Star team of over two dozen law firm marketing and business development experts who share their secrets of success. Having guided, trained, coached, managed, and consulted with thousands of lawyers for hundreds of collective years, these "Masters" provide their insights, experience, and real-world tips for attracting, retaining, and growing great clients.

In this report we cover major aspects of business development including: identifying personal strengths; finding practice niches; building powerful internal and external networks; delivering exceptional levels of client service; accelerating cross-selling; getting and maximizing effectiveness in client meetings; improving lateral success and enhancing lateral integration; applying alternative fees; utilizing social media; and making business development a career-long, sustainable process.

The genesis of this report can be traced to a DVD-based business development program I created called CMOplaybook®, which featured 28 experts on legal marketing, business development, and client service. We discussed best practices, with a focus on providing extremely practical approaches and specific examples of proven tactics. What has emerged in this report is a compendium of world-class, immediately usable tools for taking your practice to the next level. Each Chapter contains dozens of approaches, mini case studies, and a worksheet that prompts you to make decisions and take action. In the Appendix, you'll find a personal business development plan template that will help you craft your own customized strategies.

Given the succinct nature of this report, it cannot be an encyclopedic or academic study of every possible approach for building your practice. I chose the Chapter topics because, given nearly two decades of working with thousands of lawyers, I've found these approaches to deliver the greatest bang for the buck. While each Chapter could be its own standalone book, I've opted for a shorter, more focused, anecdotal style that provides battle-tested methods that if applied, can make a significant impact on your career. Whether you're a proactive law student, a solo practitioner, an associate grooming yourself to become partner, a new partner responsible for bringing in your own work, or a senior rainmaker looking to double down on your success, this report will have something to offer you.

Chapter 1 focuses on how to develop an exceptional practice by building on your personal strengths, differentiating your practice from others, getting noticed, and measuring your progress along the way.

Chapter 2 details practical steps for growing key networks and staying memorable in the minds of clients and prospects. It will give you examples of how to look at the sales cycle, categorize key targets, build a network of great personal contacts, stay top-of-mind with your best contacts, plan for sustainable activity, and get exceptional media coverage to create awareness and build the right reputation.

Chapter 3 provides specific tactics for obtaining, preparing, conducting, and following-up on meetings with high-value people. It helps you identify your best prospects, craft specific approaches for getting in the door, improve your effectiveness once in the meeting, and enhance your ability to follow-up after the meeting.

Chapter 4 explores how to develop long and productive relationships by delivering exceptional levels of service. The Chapter discusses what it means to become a trusted advisor, and it presents real-world approaches for enhancing relationships by delivering value beyond the client's expectations. It provides questions you can ask your clients, presents lists of specific client service techniques, and also offers a detailed consideration of feedback mechanisms – including surveys, end-of-matter meetings, and annual reviews – that can be used to identify opportunities and measure progress towards building a loyal client base.

Chapter 5 shows you how to generate more revenue from existing clients through cross-selling. It opens with a discussion of the benefits of cross-selling, and demonstrates ways to better understand the client's requirements so that new services match their business needs. It explores the hidden internal barriers that often hinder cross-selling, such as a silo mentality or protectionist mindset among fellow partners. We then include practical steps for overcoming these challenges that can foster mutually beneficial internal relationships that serve both the firm and clients. We help you identify your best cross-selling candidates, share advice on how to maximize your effectiveness when presenting cross-selling opportunities, and provide methods for keeping cross-opportunities in the minds of your clients. The Chapter also includes a cross-selling checklist to use for each prospect.

Chapter 6 focuses on rainmaking techniques for laterals. We discuss the challenges faced by lawyers joining a new firm, networking approaches for developing strategically important internal and external contacts, how to communicate your story for maximum impact, and how to find and maximize cross-selling opportunities. It also offers important information for firm leaders on trends in firm-wide lateral recruitment and integration, provides specific firm-wide suggestions on how to maximize the potential of laterals before and after they join the firm, and includes a checklist of lateral integration activities for leaders.

Chapter 7 provides an overview of how online communication can both support and enhance your business development opportunities. You will receive guidance on the benefits – and potential pitfalls – of social media, outlining approaches that will help you stake out territory in the online world. It also discusses the necessity of developing a website that differentiates you from the competition, how to reinforce the firm's presence and reputation through search engine optimization, and methods for maintaining momentum to keep online activity sustainable and effective.

Chapter 8 considers how alternative fee arrangements fit into the ever-changing legal landscape. We discuss the background and trends relating to alternative fees, explore the benefits and challenges of entering into such arrangements, identify what value means to clients, and show you examples of popular alternative fees structures. It also covers how to balance firm profitability with client value so that both parties feel good about the relationship, and we provide suggestions for developing systems within your firm to manage the alternative fee process for greatest effect.

Chapter 9 brings it all home – no matter how elegant the plan, if you don't implement it, little will change. To help you succeed, our Masters present their favorite techniques for keeping business development sustainable over a career. If you choose only one section to fully own, this is the one!

The Appendix contains a business development plan that will concentrate and guide your actions. Review it after each Chapter, then add or modify elements of your plan based on your new awarenesses and commitments. If you constantly refer back to it, it can become a powerful tool to keep you focused on maximizing your best business development opportunities.

My greatest hope for you is that you apply some of the wisdom contained in this report to your personal practice – try some new approaches, take a step or two out of your comfort zone, remind yourself of some long forgotten techniques that worked for you, and access more of your inner rainmaker. Let's make your biggest problem how to manage all the work that will be coming in your door!

About the author

David H. Freeman, J.D., a former lawyer and now CEO of the David Freeman Consulting Group, has helped thousands of managing partners, group and department leaders, partners, counsel, and associates become better leaders and rainmakers in hundreds of law firms world-wide. For nearly two decades, he has worked with over one-third of the AmLaw 200, and in 2013, for the second consecutive year, he was recognized as the best law firm business development and coaching service provider in a National Law Journal survey. He is an internationally acclaimed speaker who presents at law firm retreats, law firm networks, international, national, and regional conferences, LMA and ALA chapter meetings, bar association meetings, and law schools.

David's main areas of practice include leadership training and coaching; business development training and coaching; accelerated cross-selling; client service training and planning; retreat design, facilitation, and speaking; and business development culture assessments. He was Co-Chair of the Legal Marketing Association's 2010 Annual Conference, he has written a unique book for law firm leaders called Weekly Reminders for Revenue-Focused Leaders, and he is a co-author of Law Firm Marketing Leaders: Tips from a Collection of Experts.

He also wrote an on-going leadership column for American Lawyer Media's newsletter, Marketing the Law Firm, and he has authored many other articles on the revenue-related aspects of management, leadership, service, strategy, and business development for most of the major legal publications.

David also produces practical video tips focused on leadership and business development, he has developed a DVD-based personal rainmaking system for lawyers called CMOplaybook®, and he created a business development culture assessment tool for law firms called Culture Xray®. David can be contacted at dfreeman@davidfreeman-consulting.com.

Chapter 1:
Finding niches and developing your strategy

"I skate to where the puck is going to be, not where it has been."

Wayne Gretsky, 9-time National Hockey League MVP

In firms of all sizes, lawyers' careers are often determined by the type of work they're given. A young associate is assigned to a client and works on the same matter for years. A partner retires and their book of business is handed to a younger lawyer. An industry becomes hot, and lawyers in slower practices are encouraged to retool in the higher demand area. In all, many careers unfold more by default than design, resulting in lawyers who are unfulfilled and lack the motivation to enthusiastically build a great practice. The question you must answer is: do you truly want the practice you already have? And if your answer is no, what are you willing to do to change it?

Over the years, I've trained and coached thousands of lawyers, and I've found that those with the greatest passion, who love to meet new clients and hustle to get more work, are very often those who truly enjoy the type of work they're doing. To unleash this energy, however, lawyers must take proactive control over their career arc. They must be clear about the type of work they want to do, articulate the type of clients they want to work with, and define the type of firm that can best support them on their journey. In all, they must develop a plan and, more importantly, consistently implement that plan.

In this chapter, we will share best practices for refining your thinking around developing a sound plan. Our Masters for this section include Ross H. Fishman, CEO, Fishman Marketing Inc.; Mary Kimber, Regional Director of Marketing and Business Development, Bryan Cave HRO; and

James (Jim) Stapleton, former Chief Marketing Officer, Littler Mendelson PC and Fenwick & West LLP.

Defining and differentiating yourself – who are you and what do you enjoy?

Clients can choose between many lawyers. Why should they select you over someone else? What distinguishes you in a way that makes you stand out from the crowd? One characteristic is your level of engagement. People generally want to work with others who are passionate about what they do. Think about it: would you rather hire a professional who is highly motivated and eager to do the work, or one who is virtually sleepwalking through their day? While the world may not be so black and white, experienced buyers of legal services can tell the difference. "Clients can feel the passion you have for their business. You can't fake that energy and excitement. If you have it, clients see it immediately and find it very enticing", explains Ross Fishman.

"We also don't often talk about fun in terms of marketing in law firms", he continues. "Lawyers are smart, they work hard, they look after their clients – they're good people. But as a general rule, they aren't having fun. Many don't enjoy the practice of law and have lost their energy. They need to step back and ask themselves: What do I like doing? What case did I enjoy handling and why? What industries am I interested in that can be built into my legal practice? What knowledge do I have that other lawyers don't possess? What hobbies, special interests, and lifetime experiences do I have – what job did I do before law school?

A balanced approach

Can a lawyer build an entire practice solely around their personal interests? For some, the answer is yes, but for many others, their interests, strengths, and experiences may represent just a portion of their practice. It doesn't have to be an all or nothing proposition, according to Ross.

"A lot of lawyers don't want that full-on specialization – they find it demotivating and they prefer the intellectual challenge that comes with variety. Remember, you don't have to focus on a single practice; you're just sharpening your marketing attention and energy on certain people or groups for efficiency. Perhaps specialize a portion of your practice in areas you're comfortable with. To get a feel for where you should spend your limited marketing time, answer these questions:

- What do I love to do?
- What kind of people do I like to
- be around?
- How can I spend more time doing what I like?"

Build on your strengths

There is no “one size fits all“ approach to building a practice. Different personality styles lend themselves to using different techniques, so it’s important to build on your strengths when reaching out to the marketplace.

Jim Stapleton shares his thoughts: “In the early part of an attorney’s career, we put them through a number of training classes to find approaches to suit their individual strengths. We often ask the firm’s top rainmakers to talk about how they found approaches that fit their strengths; they all have very different tactics and yet are equally successful.

When I think of all the brands and strengths I have come across I can fit them into five subsets. Most of the attorneys who speak at our sessions align with one or more of these categories:

- Quality;
- Client service;
- Industry and expertise;
- Business acumen; and
- Cost effectiveness and value.”

The following examples from Jim Stapleton illustrate ways rainmakers have built on their personal strengths to develop their practices.

CASE STUDY

1: Service

“One attorney on the panel was a master at client service. He deeply understood the mind of the client. This attorney gives presentations on client satisfaction and feedback – the title of his presentation is ‘11 Steps to Significant Client Satisfaction’. In fact, it totalled 55 discrete steps, and by the end of his presentation, I absolutely understood why clients followed him like puppies!”

CASE STUDY

2: Public speaking

"There's an attorney who is absolutely the best public speaker I know. He's a tax partner; he speaks at tax conferences all around the world. He's not headquartered in New York but his billing rate is roughly equivalent to the New York City tax partner level. He's nationally and internationally recognized, and because he has this ability to connect with people through public speaking, he's been extraordinarily successful."

3: Business acumen

"We have an individual who has been an attorney for many years, but he spent about five years in the business world, first as general counsel and second as head of corporate development. He has an excellent capacity for speaking about business issues – not just as they relate to legal, but business issues in general. The time he spent in the boardroom allows him to give invaluable expert advice to his clients. An attorney who knows business adds tremendous value to a client in a way most others can't."

4: Writing and media relations

"Another way to engage with prospective clients and referral sources is through writing and media relations. We have an attorney who knows and works with journalists and who has a writing style that is different from most other lawyers. He once received a $2M piece of business from a quote of his that appeared in the New York Times. A CEO saw it and saved it for two years before contacting him. The attorney is particularly knowledgeable in his area of expertise, which happens to be employment, but the fact that he has an affinity for writing – and the interest in pursuing it – is what separated him from the pack."

Ross Fishman adds additional insights into ways to efficiently use writing as a business development tool. "Lawyers all know they should write. For many, however, it is a painful, time-consuming process, they dread (and avoid) opportunities that could add to their credentials and gain them greater visibility. The kind of writing I'm suggesting is perhaps 500 words on a topic you already know intimately and on which you don't need to do additional research – colloquial subjects and business-oriented topics linked to your practice.

The hard part for most lawyers is getting the information out of their head and turning it into an article because they're so busy. I advise lawyers to dictate the content for the article and send it to a writer – there are a lot of great writers out there who are relatively inexpensive. They can do 95 per cent of the writing and it is up to the lawyer to do only the last five per cent. With this kind of strategic delegation, the project gets started, most of the work is done by someone else, and having another person involved keeps momentum going."

CASE STUDY

5: Legal process and efficiency expert

Jim Stapleton continues: "Many years ago, when we were all committed to time and expense billing, one attorney's large client asked for more predictability around expenses. The client did not want him to be unprofitable, but pointed out that some things could be more efficient. The attorney responded to the client's request, and marketed his newfound approaches to managing M&A deals to become top of class in alternative fee arrangements and designing efficient processes."

Narrow your focus

In today's world, lawyers are competing for a limited amount of high quality business. To stand out from the crowd, you need a laser approach to marketing. By concentrating your business development energy toward a clearly defined population, you can build deeper and stronger relationships and cut through the clutter of other lawyers who are flailing around trying to capture their attention.

While some may need to reinvent themselves, most others can build on their strengths, utilizing the resources they already possess to enhance their opportunities. One approach is to identify where the bulk of your revenue comes from – this may be a particular area of law, an industry, or a specific set of referrers – and target those sources.

Develop your niche(s)

According to Ross Fishman, "Too often, the fundamental problem lawyers have with business development is they don't know who they're marketing to. There's little focus; they market opportunistically to anyone they happen to bump into wherever they happen to go. There's little structure or strategy behind it, so it becomes paralyzing and often overwhelming. They end up feeling like they are marketing to 'all of America'. Trying to be all things to all people hinders your ability to get noticed and remembered.

Developing a niche allows lawyers to focus on a more manageable portion of the market to display their skills in places where they are most likely to be noticed. You need to target and nurture a solid network of hundreds of people if you want to become an effective rainmaker."

Building a large personal network takes a significant commitment of time and energy. Given your limited capacity for both, you can't afford to engage in a time-consuming and wasteful scattershot approach.

Stand out to be outstanding

Unless you have something outstanding to say, you will just be seen (or not seen at all) as "yet another lawyer". According to various studies, you need to meet people seven or more times before they are likely to consider giving you their business. "It's just too hard to do that if those people don't go to the same places and do the same things," observes Ross. "You can't see 'America' seven to 20 times – where does 'America' go? Where do 'business people' go? Without some sort of strategy to target the right subset of people on a regular, ongoing basis, your efforts will be extremely inefficient."

By choosing a niche, you can zero in on the right people, send consistent messages over time, be seen as an expert, and thus be remembered when clients have those issues. By focusing on one or a small number of niches, you can better "own" that legal space in a prospect's mind. According to Ross, one effective technique to gain repeated exposure to a targeted group is to join a trade association that is populated with the kind of people you want to meet.

Groups and trade associations

A trade association is a great way to start networking with a particular group of people. The beauty of joining the right association is they do all the work of attracting and communicating with the kind people you need to know. By using their marketing and educational vehicles, you can hit hundreds, and perhaps thousands of current and future prospects through articles, newsletters, webinars, speaking, advertising, leadership positions, and attending periodic meetings and conferences.

Whether you are more comfortable speaking, writing, or joining subgroups, you can find a strategy that fits your strengths. Ross describes trade associations as the "silver bullet" that exists for law firm marketing.

You can find them in the Encyclopedia of Associations, published by Gale, and the best for you may be smaller ones where other law firms do not have a strong presence. You can then work toward leadership positions within those organizations. With the right finesse, you can become THE lawyer they think of when they have legal problems.

Develop a personal scorecard

In any sporting event, there are two levels of scorekeeping. One is the final score – the eventual win or loss numbers. The other is the game within the game – the personal statistics that show whether the players are on track toward the eventual "win".

Similarly, there are two ways to keep score in a law firm. Success measures – such as hours billed, revenue collected, and profitability – are our final score. While these are critically important measures, a deeper analysis of progress measures will allow you to see how well you're doing on your path toward winning. To that end, you should develop your own set of personal sub-goals and measures, and Mary Kimber shares her approaches in this area.

"Keeping score is one of the most critical factors of any business development or marketing plan, whether you're a large organization or an individual practitioner. Setting personal metrics can be the single most important difference between whether you will be successful or not. We should use the lessons of the Hawthorne principle: 'That which is measured will improve.'

Once you define your goals, develop a system for measuring those goals and make this a part of your daily routine. By making measurement a top priority, you will be much more likely to achieve your personal goals.

Set your goals and create measures that are within your reach, but put some stretch into it. Some preliminary questions to ask include:

- Where am I right now, and where do I want to be?
- What must I do to build my practice?
- What am I currently doing, and how can I improve on that?
- What am I trying to change or improve?
- How will that change or improvement impact me?
- Can I break my goals into sub-steps to measure my progress toward my goals?
- How will I measure my progress?"

Examples of progress measures

We can't stress enough that one of the great secrets to developing a solid, consistent practice is to develop and track specific "progress" measures. Good measures provide better focus, they increase motivation over the long haul, and they keep business development top-of-mind. The key is to find the right measures that will lead you to your goals, and that also fit your personal strengths and interests. Examples of some effective progress measures include:

- **Client feedback meetings –** which can result in greater loyalty, more of the same work, increased cross-selling opportunities, and possible referrals.
- **Extraordinary service delivered –** measure yourself on the number of "wows" you receive, the number of times clients praise you for doing more than expected.
- **Business development discussions with others in your firm –** which can result in identifying opportunities, holding each other accountable for action, and cross-selling.
- **Leadership positions in targeted outside organizations –** which can lead to meeting more targeted prospects and greater visibility in your niche markets.
- **Contacts made with high priority targets –** which can lead to greater top-of-mind awareness and being in the right place at the right time when opportunities arise.
- **Size of key networks –** the more people you know, the better chance you have of getting work. Collect a lot of the right people, and cluster them into similar categories to help you communicate with them efficiently.
- **Referrals given and received –** the more referrals you give, the more likely it is that people will feel obligated to give referrals back to you.
- **New relationships built on both sides –** meeting more people inside a client, and getting more of your clients to meet others in your firm, can increase client retention and lead to more cross-selling opportunities.

- **Meals with clients, prospects, and referral sources –** there is something magical about sharing food with another person. Increased face time and sustained conversations create deeper personal connections and more opportunities to explore their needs.
- **On-going communication –** given that we've learned it can take 7–20 contacts to get work, you need to develop many creative and value-laden methods for staying in touch (we will suggest many such approaches in Chapter 2).
- **Presentations –** this can get you on-site at a client's location, allowing you to demonstrate your capabilities, deepen existing relationships, and meet new decision-makers.
- **On-site visits –** whether for presentations, general visits, delivering documents, holding meetings, grabbing lunch, or conducting "office hours", getting on-site opens worlds of opportunities to meet new people and find more work.
- **Practice groups used –** the more the client uses the firm in areas other than yours, the tighter the connection to the firm, and the less likely they are to leave.
- **Time invested in business development –** nothing takes the place of good, old-fashioned effort. Put in the time, in the right ways, and good things will come.

You should allow yourself to acknowledge and celebrate your progress. Whether it's a new prospect lunch, a meeting with a new referral source, a new leadership position, or an in-house presentation to a client that gets you in front of other decision-makers, give yourself credit for doing the right things that will help you to build a bigger, better client base.

Create personal deadlines

It's not enough to just measure – you must also set deadlines for when you will achieve those measures. Four lunches with prospective clients are good, but by when? What is a stretch, but reasonable number of activities you can complete? Push yourself, because in most cases you can do more than you are now. Organize yourself so that it becomes part of your routine on a daily, weekly, or monthly basis.

ACTION PLAN

Action planning worksheet

Which of my current practices do I enjoy most?

What particular strengths can I build on (e.g., quality, client service, industry and expertise, business acumen, cost effectiveness and value, etc.)?

In the practices I most enjoy, where can I find a niche group of decision-makers?

What group or trade association can I join and get better known in that is filled with targeted prospects?

What should I do within that group or trade group to get noticed by more targeted people?
Which measures can I use to chart my progress toward achieving my goals?
How frequently will I check in on my progress to see how well I'm doing?