



THE NEW ELLIS GROUP

# Monday Monday

*Connecting the Dots with Karen Kaplowitz*



*Helping you create and reinforce the habits of successful career building,  
gleaned from my work as a business development strategist, trainer and coach*

Volume 4, Issue 1

January 4, 2010

**Big Plans. Small Steps.** Are you gearing up to accomplish all your business objectives for 2010 in one fell swoop with a long “to-do” list? Ambitious plans are great but they can be overwhelming if they are not prioritized and broken down into concrete steps in a specific time line. The Chinese philosopher Lao-tzu said it all: A journey of a thousand miles begins with a single step. Instead of a long list of business development tasks, develop an action plan for your priority goals in each of the following categories:

- Existing client relationships. Which existing client has the most potential for expanded business? What steps do you have to take? Renegotiating your fee structure? Introducing new lawyers or practice groups to the client? Meeting other in-house lawyers?
- Recent referral sources. Which ones – inside or outside your firm – are most likely to have new work to refer to you? What steps will enhance your relationship? How do you stay on their radar?
- Prospective clients. Which one is the best short-term prospect? Which ones need what you do or are unhappy with current lawyers? Which ones know your quality? Who do you see regularly?
- Prospective referral sources. Which ones know you well enough to vouch for you? Which ones can you help reciprocally to build your relationship? Do your homework. Google people of interest so you are ready to talk to them.
- Reputation and visibility. Can you plan one high visibility speaking, writing, or public service engagement that would enhance your professional reputation?

Your initial business plan for 2010 could be as simple as one item in each of these categories, broken down into specific action items, on a time line which allows you to set realistic goals.

**Example:** 2009 was a good year for you, with solid results for significant clients but you know you have to prove yourself again. One major matter is winding down and you have no prospects to replace it. Among recent clients, one was acquired and your people left; one is about to file bankruptcy; and one won't pay your rates. To drum up work, you concentrate on two categories: former clients and firm clients who haven't used your services. For each category, you lay out a plan, step by step, including how much time each will take so you can decide how much you can do immediately.

Your top priority is a former client who just became general counsel of a new company your firm does not represent. Before you call her, you research everything you can about her new company: its business; their current law firms; recent legal matters; and everyone in your firm who has a potential relationship to the company. You are prepared with a game plan which might include other people to propose she meet or events she might participate in. Then you make plans to see your former client.

Your next priority is finding a firm client who has legal needs in your specialty but does not work with lawyers in your office. You ask your office's managing partner and marketing staff to help you determine which of your firm's major clients have not used local lawyers. You prioritize the client list based on which have the largest local business presence and which ones have relationship partners whom you already know. Then you start approaching the relationship partners to explore their clients' needs and their willingness to introduce you to the clients and schedule meetings.

Are you ready to focus in an effective way on your priority business development goals for 2010?

**Have a happy, healthy and prosperous New Year.**