



# 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*

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**Uncluttering Your Strategic Planning.** If you have put off creating a business plan because it seems like too big a job, try cutting the process down to size. Many people start a business plan by making a list of all the people they have been meaning to call. Then they are paralyzed by the prospect of dealing with a substantial list. If you are stuck because of a lot of unfinished business or unrealistic prospects, here are some approaches to consider:

- Divide your big list in two – A and B. The “A” list contains people who know you, have had positive experiences with you, trust you, and are in a position to hire you or refer work to you. The “B” list contains everyone else. Put the “B” list aside and you are ready to focus on your priority people.
- If you are still distracted by non-priority people on the “B” list, find an easy way to connect with them immediately, like sending them an article or inviting them to an event. Otherwise they will remain a distraction to your growing your business. Do not elevate “B” list people to priority status if they are not in a position to be helpful because they have been on your list for a long time but do give yourself permission to do something to eliminate their distraction.
- If the “A” list has people who could provide great work, but you barely know them, either commit to an immediate plan of action to meet with them and engage them or take them off of the “A” list. Make your “A” list a feasible working list, not a wish list.
- If you have the luxury to give yourself time to do some in-depth planning, then devise a strategy for each person or group on your “A” list. But if you are like many people who feel the need to take more immediate action to drive new business, consider whether you have any simple and immediate ways to be in touch with your “A” list people, like sending a note or recent article of interest, or inviting them to some event.

Once you have eliminated the distractions of non-priority, unfinished business, eliminated unrealistic people, and taken the pressure off with respect to priority people by some simple contacts, you are ready to concentrate on the heart of your planning: identifying a detailed strategy for each priority client or prospective client.

**Example:** For years, every time a lawyer was asked to update her business plan, she listed a former partner from a former law firm who had become general counsel of a significant company. The former partner was a marquee name and having him on the list seemed very promising. But she never figured out a way to reconnect with her former partner and over time, having the former partner on her list became a liability. On several occasions, other partners in her firm asked her if she could help with an introduction to her former partner and she had to candidly admit that she could not because she had not been in touch with him since they worked together. At her annual reviews, someone always asked her about her progress in connecting with her former partner. Finally, she took him off her list. Doing so helped her focus on the more realistic but less flashy people on her list of prospects.

Are you ready to clear the decks of the prospects on your lists who are keeping you from focusing on your most promising and realistic prospects?