



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*

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Checklist of Recommended Actions for 2014. The first newsletter of 2014 ([Click here to read](#)) posed a series of questions and a challenge, to compare your action items for 2014 to the list below. Here are recommendations to consider as you launch your business plan for 2014:

- Start by reviewing last year's plans, like the ones you did for year-end reviews. Eliminate unrealistic items, such as pursuing people you barely know.
- List the sources, internal and external, of your major work in the last two years. If the work is likely to continue or could be expanded, consider the specific steps you need to take to deepen or renew each relationship. Plan to see or talk to each source or client in the next month.
- Reflect on how you secured your best clients in the past and then list the steps you could take to replicate that success.
- For each specific prospective client, think through how you will engage with them, including where and how often you will see them and who can help you build a relationship. Think long-term, not one lunch and done, and then take the first step.
- Find good excuses to reconnect with former clients for whom you got great results, even if you have not communicated recently. Examples include notes of congratulation on some recent success of theirs or something related to your old matter. Keep the focus on them.
- Prioritize among your targets by doing a reality check on which ones really need you or your firm. For example, if a prospect works exclusively with his brother's law firm and is satisfied with their work, that prospect is not a top priority. If a prospect's company has an approved law firm list that will not be revised for several years, that prospect is not a priority.
- Understand that writing, speaking, and organizations are important for establishing your credibility, not just for attracting new clients. Help existing clients and prospects have greater confidence in you by writing, speaking or being a leader in a professional, business or community group. Decide on a group and then enlist someone to help you become active.
- Do not neglect marketing yourself inside your firm. Your colleagues are important sources of new work and other opportunities. Be visible and build key internal relationships by leadership and communications within the firm. Identify your own mentors and people you will mentor.
- Be honest about the extent to which you are prepared to invest in building your career this year. Make reasonable commitments to yourself and then act on them every day. Create a plan to pursue new business persistently; no initiatives are done after one attempt.
- Create a support network for yourself, preferably among lawyers and staff in your firm, and then regularly review the results you are getting from your plan with them, and on your own.

Creating a great business plan for 2014 requires just a few qualities on your part: a realistic assessment of your best opportunities and a commitment to persistent pursuit of those opportunities. Have a great year and let me know about your successes.

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