



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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When to Act: TODAY. If you spent the holidays thinking, occasionally, about your business plans for the New Year or if you submitted a business plan or self-evaluation at year-end to your firm with a set of commitments for the New Year, then the question is when are you going to take action? On the first day back from the holidays, you may have clients clamoring for attention on their matters and a backlog of deferred tasks to deal with. But consider whether you can get started on implementing your business plans with some of these steps which may not take a lot of time:

- Can you identify a few priority prospective clients, especially ones who were unavailable toward the end of the year, and commit to use the occasion of the New Year to shoot them a note? “Now that the holidays are over, shall we make a plan to get together? Please suggest dates.”
- For clients and prospects who closed transactions at year end, can you congratulate them on the completion of their deals [and suggest planning a time to meet or talk]?
- What occasions are on your calendar in the next month that provide an opportunity to invite a client, prospect, or firm colleague to join you? Meetings of organizations; sports events; CLE?
- Which firm colleagues mentioned that they might be visiting your office in the next month? Can you ask if they would like you to set meetings for them, with clients or other colleagues?
- Do you have meetings at client facilities planned in the next month that would allow you to arrange at the same time to see other people at the client or to introduce other firm lawyers?
- Do you have a practice group meeting or a professional or industry organization meeting coming up for which you can submit agenda items or volunteer to take leadership on an issue of interest to you?

Initiating your business plans with preliminary steps right out of the gate will launch your year strongly. You do not have to devote massive amounts of time to be effective, create momentum, and show your commitment to executing on your plan.

Example: At his year-end review for 2014, a partner stated that he planned to introduce another practice group to one of his clients and to help facilitate work for that group. His plans never materialized in 2015. In his year-end 2015 self-evaluation, the partner explained the circumstances that had prevented him from completing the task and committed to fulfilling his promise in 2016. In December, he reached out to the other practice group leader involved and asked when she would be in his area and got a number of dates. He is now prepared for early 2016 to call his client to arrange a meeting and to offer to bring along the other practice group leader to meet with the client. By the time he meets in early 2016 with firm management to discuss his 2015 performance, he will be able to confirm that he has finally made good on his earlier promise. He will also be able to share with his own practice group at its first meeting in 2016 that he is organizing a meeting to introduce another firm practice group to his client for cross-selling purposes and recommends that others do the same.

Can you get in the habit of integrating business development into your regular work days and moving your agendas forward with small or preliminary steps even when you are busy? Can you make taking some action **TODAY** part of your regular routine?