

NAME _____ DATE _____

2011 Individual Business Development Plan: Defense Litigation

SELF-REFLECTION:

List two of your primary Strengths

EXAMPLE: numerous referral sources; memberships in trade groups

- ✓ _____
- ✓ _____

What should you do to take advantage of these?

List two of your primary Weaknesses

EXAMPLE: dislike events or travel, workload makes follow-through difficult

- ✓ _____
- ✓ _____

What will you do to improve upon these?

List two primary Opportunities in your practice area

EXAMPLE: new areas of risk being insured, a new law or regulation going into effect

- ✓ _____
- ✓ _____

What will you do to capitalize on these?

List any Threats to your practice area

EXAMPLE: client acquisitions or claims management changes; industry regulation or statutory changes

- ✓ _____
- ✓ _____

What can you do in response to these?

CURRENT BUSINESS:

How are you currently obtaining most of your work? EXAMPLE: attorney or client referrals, membership in the ABC Association

In what specific situations and for what type of work should colleagues and clients automatically think to refer files to you? EXAMPLE: Coverage dispute, trucking accident, construction defect, recreational product liability

- ✓ _____
- ✓ _____
- ✓ _____

What situations listed above would you like to focus on developing more of in 2011?

What are the best revenue producing cases in which you are currently involved?

Client: _____ Nature of claim: _____

Client: _____ Nature of claim: _____

What trade/community organization(s) is essential to in-house counsel or key claims people of these clients?

Client: _____ Trade organization: _____

Client: _____ Trade organization: _____

Are you active in these trade organization(s)? Yes No

What trade organization/association are you currently active in? _____

What trade organization/association would you like to become active in? _____

2011 ACTION PLAN

Rank your level of interest in the following activities:

(1 = "I'll do it"; 2 = "I might do it"; 3 = "I won't do it")

- _____ Speaking at conferences/seminars
- _____ Writing articles/blog posts/new alerts
- _____ Joining and networking in a trade group
- _____ Taking a leadership position in such a group

- _____ Teaching targeted CLE or CPE
- _____ Attending targeted industry-related events
- _____ Targeted pro bono or community relations work
- _____ Other (please specify) _____

For items you ranked with a "1" list at least two actions you can take. Calendar deadlines. EXAMPLE: join and attend ABC Association meetings, speak at annual meeting of (name of group) and contact program chair by a certain date; write article on A

Activity: _____

✓ Action: _____ Deadline: _____

✓ Action: _____ Deadline: _____

Activity: _____

✓ Action: _____ Deadline: _____

✓ Action: _____ Deadline: _____

Are there current clients of the firm with which you work that have additional lines of risk/litigation for which you think the firm could be retained? (List client and new type of claim/dispute we might obtain)

Identify a prospective group(s) of clients by industry, say, meatpacking or amusement parks, that interests you:

- ✓ _____
- ✓ _____

What actions will you take to better familiarize yourself with this industry?

✓ Action: _____ Deadline: _____

✓ Action: _____ Deadline: _____

Please list two prospective clients. List the key person you know there, even if just casually, and the company

- ✓ _____
- ✓ _____

What actions will you take toward obtaining them as clients in the next 12 months? Calendar deadline.

✓ Action: _____ Deadline: _____

✓ Action: _____ Deadline: _____

✓ Action: _____ Deadline: _____

Identify two or three referral sources by name, company, industry (i.e., John Doe/ABC Insurance/commercial insurance broker, or Jane Doe/ABC Foods, risk manager)

- ✓ _____
- ✓ _____
- ✓ _____

What actions will you take to obtain an initial or more referral(s) from each? Calendar deadline.

✓ Source/Action: _____ Deadline: _____

✓ Source/Action: _____ Deadline: _____

✓ Source/Action: _____ Deadline: _____

With whom will you discuss this plan as you progress this year? Name: _____ and how often? Every _____ days. Calendar these updates. How will you reward yourself when key actions listed above are completed? _____