

Name:

Date:

Business Development Self-Assessment

Directions: Read through the following statements. On a scale of 1-5 (5 being the highest), rate how true each statement is for you.

A. Mindset

	Level of Agreement
1. I have in writing – and use – a well-thought-out business development plan.	[]
2. I feel I have control over whether or not A-level business comes through my door.	[]
3. I read at least three books on marketing and/or business development a year.	[]
4. I'm aware of how my beliefs about marketing – both negative and positive – impact my approach to business development.	[]
5. I have a clear picture of how my practice and life would change if I were able to fill my practice with the matters and clients of my choosing.	[]
Total	[]

B. Focus

	Level of Agreement
1. I know exactly what kind of clients and matters to cultivate and I know how and where to reach them.	[]
2. I can accurately and specifically describe the demographic and/or business profile of my most profitable and satisfying <i>clients</i> , whether individuals or entities.	[]
3. I can accurately describe the specific parameters of the kinds of <i>matters</i> I seek.	[]
4. I'm able to comfortably and authentically differentiate myself from the crowd of attorneys who target the same clients and matters.	[]
5. I actively work to promote myself as serving one or two well-defined niche practice areas and/or target markets.	[]
Total	[]

C. Relationships

	Level of Agreement
1. I know how to identify and reach new "Centers of Influence" – people who are influential among my client base or with other potential referral sources.	[]
2. I track the source of all files that I open or work on.	[]
3. I have an up-to-date, written list of my 20 top referral sources.	[]
4. I routinely devote time to educating myself about the key business opportunities and challenges faced by my target clients and my referral sources.	[]

5.	I can easily compile a list of past and present clients who are candidates for cross-selling.	
6.	On a regular basis I practice building rapport with clients and influencers by being genuinely interested in their likes and dislikes.	
7.	I routinely acknowledge and thank my clients or influencers who refer a matter to me.	
8.	I invite my clients and referral sources to participate with me in activities (sports, theater, etc.) that I enjoy outside of the practice of law.	
9.	I routinely plan at least ____ in-person marketing activities (lunch, breakfast, golfing) per week: 1 = 1 activity, 2 = 2 activities, 3 = 3 activities, 4 = 4 activities, 5 = 5 activities.	
10.	I routinely make at least ____ phone calls per week that contain some conversation to build rapport or market myself to clients and/or referral sources: 1 = 1 phone call, 2 = 2 phone calls, 3 = 3 phone calls, 4 = 4 phone calls, 5 = 5 phone calls.	
Total		

D. Message

		Level of Agreement
1.	I have a natural-sounding, but informative, encapsulated talk that I use when people ask me what I do.	
2.	I have an arsenal of stories that I tell that demonstrate the kind of attorney I am, the kinds of people I help, and why.	
3.	I comfortably use examples of the kind of results my clients have experienced that illustrate their improved personal or business condition.	
4.	I have interviewed enough of my clients, referral sources, and influencers to know what they are looking for in an attorney.	
5.	I take time educate my clients, referral sources, and influencers about how to best promote me; how to best talk about who I am, what I do, and for whom.	
6.	I have an ethical and comfortable way of asking existing <u>clients</u> for additional business or new referrals	
7.	I have an ethical and comfortable way for asking existing <u>referral sources</u> for new referrals.	
8.	I have an ethical and comfortable way for asking existing <u>influencers</u> for introductions to other referral sources.	
9.	I prepare for each business-building meeting in advance and have a list of questions to ask, things to listen for, and objectives for a "next step."	
10.	I train my secretary, or members of my staff, to market the firm and I acknowledge them for any work they bring in.	
Total		

E. Channels

		Level of Agreement
1.	Our website is visually attractive, is search engine optimized, and is kept up-to-date with content that is meaningful to my target client base (i.e., that provides useful information to help them solve their problems).	
2.	My bio page contains as much or more information about my clients, their needs, and the results they experience as it does about me and my credentials.	
3.	I work at building my web/social media visibility through platforms such as LinkedIn, AVVO, JDSupra, etc. on a regular basis.	
4.	Our print and collateral material is distinctive and first-class.	
5.	I distribute a monthly or quarterly newsletter to clients and/or referral sources that contains advice and useful information.	
6.	I publish at least two articles a year in targeted outlets such as association newsletters, industry publications, or professional journals.	
7.	I speak at least three times a year at targeted events such as professional development seminars, industry conferences, chambers of commerce, etc.	
8.	I am actively involved in at least two non-bar organizations.	
9.	My firm sponsors or co-sponsors at least two events and/or organizations to build visibility with our target client base.	
10.	We know how to generate local press coverage of our people and services and client results.	
Total		