

# Business Development Checklist

Use this checklist to build on your strengths, leverage what is working and minimize areas to improve. **Align your actions with your long-term goals.**

Focus on 1 or 2 actions at a time depending on your time frame. Record your progress.

## **Build relationships with your referral sources**

- Review referrals from the last 1-4 weeks.
- Identify who you want to follow up with from your referral list.
- Make 1-3 meaningful contacts with referral sources per week.

## **Grow relationships with your professional network**

- Identify what committee/organization you want to get involved in. Make the call to learn more.
- Review your professional network, including professionals who serve your target client, legal network, people you met at recent networking events. Decide which professional relationships you want to strengthen.
- Make 1-3 meaningful contacts with your professional network per week.

## **Nurture relationships with selected former clients**

- Review list of cases you recently closed. Identify who you want to follow up with from client list.
- Make 1-3 meaningful contacts with former clients per week.

Notes:

## Business Development Checklist Continued

### **Build your online reputation**

- Strengthen your online profile. Why should clients choose you?
- Write an article or content that aligns with your brand.
- Post an article on LinkedIn, twitter & Facebook.

### **Strengthen your thought leadership**

- Research opportunities to give a presentation or talk on your area of expertise.
- Outline a series of blog posts on your area of expertise.
- Explore opportunities to train and teach on your topic of expertise. Send an e-mail to the person.

### **Review your quarterly results**

- Number of client consulted.
- Number of new/increased referrals.
- New cases aligned with your areas of strengths and interests.
- Financial targets.

Notes: