

## CLIENT DEVELOPMENT FOR LEGAL ASSOCIATES



# 10 Essential Elements for an Associate's Client Development Plan









*If you don't know where you are going, you will probably end up somewhere else.*





- Lawrence J. Peter

## Client Development Plan

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### 10 Elements an Associate's Client Development Plan Should Include:

-  1) **Three or four well defined goals.** Your goals should be specific and measurable. At the end of the year, you should be able to answer whether they were achieved with a “yes” or “no.” For example, if one of your goals is to write and place more articles, indicate how many, on what topics and where they will be placed. If you want to speak at more industry meetings, list how many and which ones.
-  2) **“Loose tie” contacts and how you will engage them further.** Loose ties are people that you have a casual relationship with, but the relationship has the potential to turn into a more formal, professional one. Name the individual, and the specific steps you will take to engage them further. Inviting them to an upcoming golf outing, industry conference or lunch with others they may want to meet can strengthen the relationship.
-  3) **List of current client relationships that you can add value to.** Gaining new clients is great, but growing the business of current clients is even better. It costs less money and requires less effort for both you and them. Identify which clients have some room to grow, even if it's outside your practice group, and help them understand how you and your firm can help them even further.
-  4) **A list of individuals you will commit to give more face-to-face time.** Identify several individuals who have been valuable to you in the past and commit to giving them more of your undivided, personal attention this year. Whether it's current clients, referral sources or your firm's director of marketing, write the name down, and record when you will meet with them in person.
-  5) **An outreach plan for key contacts.** The goal is to become a useful source of information for key individuals, while at the same time subtly informing them of your own accomplishments. Make time in your schedule (outlook calendar reminders are great here) to send e-blasts to a targeted email group. Possible topics may include new legislation that affects their business, a link to an article you've written or press coverage on a recent case win.
-  6) **Ways that you will enhance your online presence.** Conduct an analysis of all of the places prospective clients can find you online such as your firm website, LinkedIn, Facebook, Twitter, Martindale Hubble, etc., and choose one or two that you will work on enhancing in the coming year. This may include rewriting your LinkedIn summary, uploading a headshot to Twitter, posting a link to a recent article that you've written, or increasing contacts/followers/friends, etc.

-  7) **A commitment to rewrite your website biography.** Attorney biography pages are the most frequently visited pages on law firm websites and Google key word searches are the number one way people find most law firm websites. Be sure that your website biography includes specific search terms that people might use to find your services. When rewriting your biography write with your ideal client in mind, emphasizing your strengths and how they help your clients.
  
-  8) **Ways that you will make association membership work for you.** Membership in associations isn't enough. In order for them to be beneficial from a client development perspective, you have to get more involved. Focus on one or two organizations and specify the ways in which you will become more actively involved. Perhaps you will join a committee, lead a CLE or speak at an upcoming conference.
  
-  9) **Article topic ideas and target publications for placement.** Commit to writing a specified number of articles. Write down the topic, where you would ideally like it to appear and schedule time in your calendar to write it.
  
-  10) **How you will increase your exposure internally.** It's likely that current clients of your firm could use your services, but your colleagues may not be fully aware of areas of expertise. Take time to educate the attorneys in your firm by giving a lunch-and-learn style presentation, or schedule lunch quarterly with an attorney outside of your practice group to identify potential cross-marketing opportunities.

Once you have laid out your plan, think of it like any other file. Set aside time in your calendar to accomplish what you have written down and revise as appropriate. Recognize that client development is a long-term investment. Your efforts today will pay dividends over time and your client development plan will lead to your future success.

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