

## Client Development Planning Worksheet for

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### What do I do?

These are my practice areas:

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I want to focus my client development efforts on the following practice area(s):

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### Who needs what I do?

Most of the clients I serve tend to have the following characteristics:

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I want to focus my client development efforts on prospective clients with the following industry, demographic or geographic characteristics:

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Specific prospects I want to pursue:

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### How can I reach them?

- Personal contact
- Organization membership
- Seminar invitation
- Writing for publication
- Advertising
- Newsletter
- Other \_\_\_\_\_

**Competition**

These are my competitive advantages:

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Here is at least one atypical area of expertise that I have or might develop and publicize to increase my competitive advantage:

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**Goals**

My biggest concerns about the growth of my practice are:

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These are my long-term objectives for my practice (1 to 5 years):

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This is what I want to accomplish in the next 12 months:

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The following factors represent obstacles to reaching my goals:

In my professional life: \_\_\_\_\_

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In my personal life: \_\_\_\_\_

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Bad habits, fears, procrastination, etc.: \_\_\_\_\_

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This single change in the way I conduct my personal or professional life would most greatly benefit my practice: \_\_\_\_\_

**Who can refer clients to me?**

I should cultivate referral relationships among people in the following categories:

- Clients
- Friends/relatives
- CPAs
- Attorneys, in these practice areas: \_\_\_\_\_
- Civic, charitable or religious organizations
- Social or recreational organizations
- Business or trade organizations
- Bankers
- Real estate professionals (brokers, appraisers, planners, surveyors, etc.)
- Other financial professionals (stockbrokers, financial planners, etc.)
- Insurance agents (life, health, commercial, etc.)
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Individuals in the above-marked categories whom I might contact for referrals:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

## Tactics

In what ways can I effectively reach any of my targeted referral source groups?

- Personal contact
- Organization membership
- Seminar invitation
- Writing for publication
- Advertising
- Direct-mail
- Other:

What types of personal contact with clients, prospects, referral sources, etc., would be appropriate for me?

- Breakfast, lunch, dinner
- Hosted social functions
- Golf
- Sporting events
- Concerts, plays
- Visits to client businesses
- CLE seminars on: \_\_\_\_\_
- Seminars for other groups of professionals on: \_\_\_\_\_
- Seminars for clients on: \_\_\_\_\_
- Seminars for members of the public: \_\_\_\_\_
- Presentations for community, business or professional organizations: \_\_\_\_\_
- Articles for outside publications (e.g., professional or trade journals): \_\_\_\_\_
- Original publications on topics of interest to clients, prospects, potential referral sources, etc.: \_\_\_\_\_
- Other:

What could the firm provide to help me reach my goals?

- More cross-selling
- More financial resources
- A higher profile for the firm in the community or the profession
- More educational and training resources
- More mentoring in professional development
- Other: \_\_\_\_\_

**Community activities**

Trade, charitable, civic, religious, recreational, social or political organizations (1) to which I already belong and (2) that I might join and that offer a chance to increase my public visibility and put me in direct contact with potential clients and referral sources:

(1) Organizations to which I belong	(2) Organizations I might join

**Personal development**

What skills should I develop or improve to help me reach my client development objectives?

- Public speaking
- Listening and one-on-one communication
- Social skills
- Time management
- Stress management
- "Selling" techniques
- Supervising and motivating staff
- Presentation skills
- Collection methods
- Other: