

My Marketing Priorities for _____
MONTH

Calls to Clients	Purpose	Date Reached Result	
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Calls to Referral Sources	Purpose	Date Reached Result	
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Cross-Selling Opportunities

Introduce (client) _____ to (attorney) _____ for (service) _____
Introduce (client) _____ to (attorney) _____ for (service) _____

Referral Source Thanks

Thank _____ for referring _____
Thank _____ for referring _____

Community or Professional Involvement

Organization/Meeting/Event _____ Date _____
Organization/Meeting/Event _____ Date _____

Ideas

Articles _____
Seminars _____
Firm events or promotions _____
Other _____