



Hulcher & Hays

Attorney: _____

What Do I Do?

The practice area to which I want to devote most of my marketing efforts this year:

Goals: Results

These are my long-term objectives (3 to 5 years) for this practice area:

This is what I want to accomplish for my practice during the next 12 months (check and complete all that apply):

- ___% growth in fees collected
- ___% growth in realization rate
- ___% growth in new matters
- ___% growth in new clients
- More referrals from existing clients (goal: ___)
- More referrals from non-clients (goal: ___)

What Types of People or Businesses Need My Services in This Practice Area?

How Can I Reach Them Directly?

- Write articles on _____
- Speak at seminars on _____
- Join an organization related to them or their business
- Social media
- Personal contact and entertainment
- _____
- _____
- _____

Who Influences Their Selection of Attorneys?

- Other attorneys (in these practice areas):
 - _____
 - _____
 - _____
- CPAs
- My current clients
- Bankers
- Real estate professionals (brokers, appraisers, planners, surveyors, etc.)
- Other financial professionals (financial advisors, financial planners, etc.)
- Insurance agents (life, health, commercial, etc.)
- Trade or professional associations to which they belong
- _____
- _____

How Can I Reach Those Influencers?

- [] Writing articles _____
- [] Speaking at seminars _____
- [] Joining an organization related to them or their business
- [] Social media
- [] Personal contact and entertainment
- [] _____
- [] _____

Separating Myself from the Competition

Here is at least one atypical area of expertise or personal/professional quality that I have or might develop to increase my competitive advantage:

My Top Ten Clients (Active)

At-Risk Clients that I Want to Keep

Former or Inactive Clients that I Want to Reclaim

Under-Served Clients¹

Known Referral Sources

¹ These clients have more legal needs than I am providing, or have needs in other practice areas

Potential Referral Sources

Prospective Clients

Goals: Activity

This year, I will:²

[] Have __ lunches per month with clients, prospects and referral sources

[] Thank known referral sources in the following way(s)

[] Write __ articles for readers who need my services or influence attorney selection, on topics such as:

² Check and complete only those activities that apply to your practice and goals

Join and be active in the following organization(s):

Attend the following events:

Utilize the Internet in the following ways:³

Advertise in and/or write for the following publications:

Pursue peer recognition:

- Martindale-Hubbell AV-Preeminent rating
- Certified specialization
- Super Lawyers
- Best Lawyers
- Avvo "10" rating

Develop professional expertise in the following areas:

³ Examples might include expanding your website bio page or practice page; populating your listing in Avvo; advertising via Google AdWords, Avvo premium listings, etc.; utilizing social media (e.g., LinkedIn, Twitter, Facebook, Google+); distributing articles via email, etc.

[] Present __ seminars on topics such as:

[] Have an "annual meeting" with __ "A" clients:

[] Visit at least __ business client per month at their office or place of business:

[] Purge the following "C" clients:

Practice Transition

[] Begin/Continue transitioning my practice and clients to: _____

[] Work with _____ in transitioning his/her practice to me

[] _____

15 Seconds or Less

How I answer the questions, "What do you do for a living?" and "What kind of law do you practice?"

Summary 1: The Cocktail Napkin Plan

I am focusing on (practice area) _____

Here's what I tell people I do for a living (see above)

My "results" goals are to _____

My main activity goals are to _____

My transition priorities (if any) are to _____

Summary 2: The 5-Step Plan

What do I do? _____

Who needs what I do? _____

How do I reach them? _____

Who influences them? _____

How do I reach them? _____