

# SAMPLE BUSINESS AND MARKETING PLAN

<b>Business Plan For</b>		<b>Year:</b>	
	(Attorney Name)		(Time Period)

This worksheet is designed to assist you in developing your individual business plan for the year. The objective is to set challenging but realistic goals. Because no two attorneys are likely to contribute to the firm in exactly the same way, the objectives of this process are to achieve an overall increase in lawyer contributions to the firm, to improve planning of effort, and to ensure that your goals are aligned with and sufficient for the health of the firm itself.

OBJECTIVE CRITERIA			
<b>Billable Hours</b> (I project my billable hours as follows:)	<b>Break out by area of law:</b> <hr/> <hr/> <hr/>	<b>Hours:</b> <hr/> <hr/> <hr/>	<b>Total Billable Hours:</b>     <hr/>
<b>Nonbillable Hours</b> (I project my nonbillable hours as follows:)  <b>Note:</b> use planning section at end before filling in numbers.	<b>Law firm administration</b> (committee activity, meetings, firm project etc)  <b>Marketing &amp; Business Dev.</b>  <b>Continuing Legal Education</b>  <b>Professional Activities</b>  <b>Pro Bono</b>  <b>Other (Please describe):</b>	<hr/> <hr/> <hr/> <hr/> <hr/>	<b>Total Nonbillable Hours:</b>      <hr/>
	<b>Total of Billable and Nonbillable Hours:</b>		<hr/>

<p><b>Projected Revenue:</b></p>	<p><b>Projected dollar value of the billable time you will work</b> (Effective hourly rate multiplied by your anticipated billable hours):</p> <p>_____</p> <p><b>Projected collections in dollars for matters for which you are billing attorney:</b></p> <p>_____</p>	<p>_____</p> <p>_____</p>	<p><b>Total Projected Revenue:</b></p> <p>_____</p>
<p><b>Business Development:</b> (increasing the revenue you generate)</p> <p><b>New Business from existing clients</b> (including but not limited to cross selling)</p> <p><b>New business from new clients:</b></p> <p><b>Improved leverage:</b></p> <p><b>Value billing</b> in excess of standard formula:</p> <p><b>Other</b> (describe):</p>	<p><b>Projected additional revenues:</b></p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p><b>Total Projected New Revenues:</b></p> <p>_____</p>
	<p><b>Total of Projected and New Revenues:</b></p>		<p>_____</p>

SUBJECTIVE CRITERIA AND PLANNING AREA			
Goals/Objectives	Specific Steps to Be Taken (Attach additional sheet if necessary)	Hours	Anticipated Necessary Firm Resources Needed
<b>Marketing:</b> Provide specific information regarding any of the following marketing activities you will engage in:			
<b>Market planning and research:</b>			
<b>Targeted marketing:</b>			
<b>Speaking engagements:</b>			
<b>Writing articles for professional or industry publications:</b>			
<b>Writing a newsletter or client alert:</b>			
<b>Development of referral sources for new business:</b>			
<b>Participation in professional, trade or other associations:</b>			
<b>Planning client events other than educational:</b>			
<b>Other marketing (describe):</b>			
<b>Total Marketing Hours:</b>			





Goals/Objectives	Specific Steps to Be Taken (Attach additional sheet if necessary)	Hours	Anticipated Necessary Firm Resources Needed
<b>Professional Activities:</b> Identify any activities, professional or otherwise, that you plan to be involved in for the year, the extent to which you anticipate business will be generated, the time that will be required, and any anticipated firm resources that will be required:	_____	_____	_____
<b>Bar Association:</b>	_____	_____	_____
<b>Social Organization:</b>	_____	_____	_____
<b>Charitable or Religious Organization:</b>	_____	_____	_____
<b>Sports Organization:</b>	_____	_____	_____
<b>Political Organization:</b>	_____	_____	_____
<b>Other (describe)</b>	_____	_____	_____
<b>Total Professional Activities Hours:</b>	_____	_____	

**SUMMARY OF PRINCIPAL GOALS FOR THE YEAR**

Briefly describe your three most important principal goals for the year, and the specific objectives you've set to get there. Your goal should be measurable so you can gauge your success. Be sure to indicate any assistance or support you will need to achieve your goals.

**Note:** examples of goals might be better management of receivables and/or work in process as evidenced by an increase or decrease in the end of year number, increasing billable hours, better leverage by increased use of technology, and so forth.

**Goal 1:**

**Goal 2:**

**Goal 3:**