

SAMPLE BUSINESS AND MARKETING PLAN

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

<p>Projected Revenue:</p>	<p>Projected dollar value of the billable time you will work (Effective hourly rate multiplied by your anticipated billable hours):</p> <p>_____</p> <p>Projected collections in dollars for matters for which you are billing attorney:</p> <p>_____</p>	<p>_____</p> <p>_____</p>	<p>Total Projected Revenue:</p> <p>_____</p>
<p>Business Development: (increasing the revenue you generate)</p> <p>New Business from existing clients (including but not limited to cross selling)</p> <p>New business from new clients:</p> <p>Improved leverage:</p> <p>Value billing in excess of standard formula:</p> <p>Other (describe):</p>	<p>Projected additional revenues:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>Total Projected New Revenues:</p> <p>_____</p>
	<p>Total of Projected and New Revenues:</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
Marketing: Provide specific information regarding any of the following marketing activities you will engage in:			
Market planning and research:			
Targeted marketing:			
Speaking engagements:			
Writing articles for professional or industry publications:			
Writing a newsletter or client alert:			
Development of referral sources for new business:			
Participation in professional, trade or other associations:			
Planning client events other than educational:			
Other marketing (describe):			
Total Marketing Hours:			

Goals/Objectives	Specific Steps to Be Taken (Attach additional sheet if necessary)	Hours	Anticipated Necessary Firm Resources Needed
Firm Administration and Management: Provide specific information regarding any of the following firm management activities you will engage in:	_____	_____	_____
Running a Committee:	_____	_____	_____
Attending Committee Meetings (note which):	_____	_____	_____
Firm Meetings:	_____	_____	_____
Mentoring/Recruiting:	_____	_____	_____
Chairing a Department:	_____	_____	_____
Attending Department meetings (note which):	_____	_____	_____
Special Firm Projects (describe):	_____	_____	_____
Total Law Firm Administration Hours:	_____	_____	

Goals/Objectives	Specific Steps to Be Taken (Attach additional sheet if necessary)	Hours	Anticipated Necessary Firm Resources Needed
<p>Continuing Legal Education: Describe any legal education you feel you need to increase your expertise in the areas in which you now practice, or obtain expertise in a new area, how it will benefit the firm, and where you will go to obtain it and its approximate cost.</p> <p>Describe any ways you could assist in the legal education of others in the firm by way of in-house seminars or a more formal mentoring program to train lawyers, paralegals or other staff.</p> <p>Include the anticipated hours, approximate cost, and how you feel it will benefit the firm.</p>	<hr/> <hr/> <hr/>	<hr/> <hr/> <hr/>	<hr/> <hr/> <hr/>
Total Continuing Legal Education Hours:		<hr/>	
<p>Pro Bono: Identify any pro bono activities and the nature and extent of your involvement. Be sure to include any anticipated firm resources which will be needed:</p>	<hr/>	<hr/>	<hr/>
Total Pro Bono Activities Hours:		<hr/>	

Goals/Objectives	Specific Steps to Be Taken (Attach additional sheet if necessary)	Hours	Anticipated Necessary Firm Resources Needed
Professional Activities: 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:	_____	_____	_____
Bar Association:	_____	_____	_____
Social Organization:	_____	_____	_____
Charitable or Religious Organization:	_____	_____	_____
Sports Organization:	_____	_____	_____
Political Organization:	_____	_____	_____
Other (describe)	_____	_____	_____
Total Professional Activities Hours:	_____	_____	

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: