

## Individual Marketing/Business Development Action Plan (“IMAP”<sup>sm</sup>)

Marketing/Business Development Action Plan for:

Direct Phone:                      Email:

Next Meeting/Phone Update:

*This Individual Marketing/Business Development Action Plan (“IMAP”<sup>sm</sup>) was created to help you achieve your goals and stay focused on the clients, prospects and activities that offer the best opportunity for securing new business.*

**My Primary Goals & Objectives for the Next Twelve to Eighteen Months**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**Target Markets** describes the target companies/individuals you would like to have as clients. Examples: pharmaceutical companies; real estate developers; health care institutions; energy companies; wealthy individuals. By targeting your efforts, you will begin to build your “brand” in the industry/among the client group, and you will be better able to understand the key issues relative to those companies/individuals.

**Target Markets:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**Target Referral Markets** describes the target companies/individuals who may send you business. They are individuals who may also be involved in the target industry on which you are focusing or strong contacts who are your peers. Examples include: accountants; lawyers; industry consultants; existing clients, etc. Target referrals are individuals with whom you will proactively develop relationships.

**Target Referral Markets:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**Key Groups and Organizations** describes your participation in networking and relationship development activities for the current year. Examples include conferences you will attend, referral networks, trade associations, leadership positions with industry groups, alumni networks, civic or charitable organizations, clubs, boards.

**Key Groups and Organizations for the Upcoming Year**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

Please describe one or more value propositions (hot issues) which will enable you to proactively open doors with current or prospective clients. Examples include briefings on new legislation, regulatory compliance audits, sourcing contract reviews, newsworthy occurrences in the marketplace with legal ramifications; CLE programs, IP portfolio reviews, international trademark updates, investigation compliance reviews, etc.

**Value Propositions**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

List your top clients. Include key contacts for relationship development in the current year. This initial list will broaden into your Contact Activity Tracker list as you continue on in the process.

Top 5 Clients		Key Contacts
1.		
2.		
3.		
4.		
5.		

List your top potential clients. Include key contacts for relationship development in the current year. Potential clients are target decision-makers from companies in key industries or areas of focus described in your "Target Markets" above. This initial list will broaden into your Contact Activity Tracker.

Top 5 Prospective Clients		Key Contacts
1.		
2.		
3.		
4.		
5.		

List your top competitors. MVPs are names of individual lawyers who are superstars at the competitor.

Top 5 Competitors		MVPs
1.		
2.		
3.		
4.		
5.		

*From month to month it will be important to have attainable action steps. By creating a manageable few each month, you will stay on track and keep the ball rolling.*

	<b>Action Steps</b>	<b>Date for Completion</b>
1.		
2.		
3.		
4.		
5.		
6.		
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