

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 _____