

Client Development Planning Worksheet for

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What do I do?

These are my practice areas:

.....
.....

I want to focus my client development efforts on the following practice area(s):

.....

Who needs what I do?

Most of the clients I serve tend to have the following characteristics:

.....
.....

I want to focus my client development efforts on prospective clients with the following industry, demographic or geographic characteristics:

.....
.....

Specific prospects I want to pursue:

.....
.....

How can I reach them?

- Personal contact
- Organization membership and involvement
- Seminar invitation
- Writing for publication
- Advertising
- Newsletter
- Other:

Competition

These are my competitive advantages:

.....
.....
.....

Here is at least one atypical area of expertise that I have or might develop and publicize to increase my competitive advantage:

.....
.....

Goals

My biggest concerns about the growth of my practice are:

.....
.....

These are my long-term objectives for my practice (1 to 5 years):

.....
.....

This is what I want to accomplish in the next 12 months:

.....
.....

The following factors represent obstacles to reaching my goals:

In my professional life:.....
.....

In my personal life:.....
.....

This single change in the way I conduct my personal or professional life would most greatly benefit my practice:

.....

Who can refer clients to me?

I should cultivate referral relationships among people in the following categories:

- Clients
- Friends/relatives
- CPAs
- Attorneys, in these practice areas: _____
- Civic, charitable or religious organizations
- Social or recreational organizations
- Business or trade organizations
- Bankers
- Real estate professionals (brokers, appraisers, planners, surveyors, etc.)
- Other financial professionals (stockbrokers, financial planners, etc.)
- Insurance agents (life, health, commercial, etc.)
- _____
- _____
- _____
- _____

Individuals in the above-marked categories whom I might contact for referrals:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Tactics

In what ways can I effectively reach any of my targeted referral source groups?

- Personal contact
- Organization membership
- Seminar invitation
- Writing for publication
- Advertising
- Direct-mail
- Other:

Community activities

Trade, charitable, civic, religious, recreational, social or political organizations (1) to which I already belong and (2) that I might join and that offer a chance to increase my public visibility and put me in direct contact with potential clients and referral sources:

(1) Organizations to which I belong	(2) Organizations I might join

Personal development

What skills should I develop or improve to help me reach my client development objectives?

- Public speaking
- Listening and one-on-one communication
- Social skills
- Time management
- Stress management
- "Selling" techniques
- Supervising and motivating staff
- Presentation skills
- Collection methods
- Other: