

Sample Page from 'Best Practice Checklists'

TARGETING POTENTIAL CLIENTS AND/OR REFERRAL SOURCES -

- Target a market, i.e. focus in on one type of industry or group (i.e. school districts or computer companies) or type of matter (i.e. construction defects or SEC indictments). Define who uses/buys these services and who your 'ideal' client is. Where are they? Research and analyze the market, then craft a plan to meet or get introduced to them.
 - Ask yourself: where are the clients I want? The goal is to see them/reach them in person on a regular basis with either substance to add value or personal contact to build and enrich the relationship.
 - Target a market, research it and pursue it with a "mix" of marketing and business development tools. Possible tools = seminars, newsletters, alerts, industry meetings; websites, blogs, personal contacts, special services, etc.
- Use on-line resources to reach trade organizations – inquire how you can help add value to their members.
 - Get involved in and/or register to attend associations, industry group meetings, events and activities that allow you to have face-to-face contact with potential clients to initiate and build relationships by learning about their problems and issues.
 - Ask your client(s) what industry associations he/she belongs to and ask to attend with them next time they have a conference and whether you could speak/present (if you are an effective speaker).
 - Participate in trade shows. Before going, plan for the 5 people you want to see or meet.
 - At events, assign people to meet specific targets and have them report back about the substance of the communication. Input information learned in Outlook or the firm's CRM system.
 - If you can't find a group of your target market, create an association, or e-mail blog and administer it.
- Think of both internal and external markets (clients and referral sources).
- Find out 'who knows whom' before reaching out or communicating.
- Communicate directly with clients: have client interviews, conduct "needs assessments", client satisfaction surveys, exit interviews, service interviews, post-proposal de-briefing.
- Personal contact is only the first step to getting business.
- Plan to spend time *preparing* to meet with a new prospective client. The time spent will pay off immediately because the prospect will feel cared about and will as a result likely hire you.
- Think broadly, out of the box.
- Build relationships, over time, as appropriate.
- It's details that make a relationship, so be sure to follow-up on the details.
- Visit or arrange to meet at their office when appropriate. Ask for a tour.
- Invite clients to everything appropriate, tied to their likes/preferences.
- Ask satisfied clients for introductions and/or referrals.

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