

A Plan to Increase Your Market Share

By Tim W. Hrastar



If you're finding it difficult to do business in this economy, or even if you're not, it always helps to be prepared with a plan.

Knowing where you want to go and having a map to get there can really make a difference between business success and failure. The following is a brief outline from a comprehensive template to help guide you through the marketing and business development plan process.

[Click here for details of the [Plans](#). Or go to the Rapport Marketing® website consulting page and scroll down to *Law & Professional Service Firm Marketing & Business Development Plans*.]

The Process

A plan doesn't have to be complicated and onerous to be effective; as a matter of fact—the simpler a plan is the more likely that it will be implemented.

Plans need to be designed to address the three main areas of a law firm. This means you first look at the marketing strategy for the firm as a whole. This includes such things as; sorting through core values, vision and mission statements, and promotional activities to promote the firm. You then move down to the next level and plan on how each practice group will market their services. Finally you work with each service provider within a practice group who is responsible for bringing in business using various methods. This usually includes the development of personal business plans for each person. This approach makes sure all goals on all levels are achieved.

Four Stages of a Planning Process

1. **Assessing:** the assessment stage is fact-finding and gathering of information. This may include client and colleague interviews and surveys, and reviewing and adapting of current information related to marketing and business development.
2. **Plan Development and Writing:** The plan development and writing stage starts to put it altogether in a logical format in order to implement it in an orderly and useable way.
3. **Implementing:** The implementation stage begins once the plan is completed, and sometimes even before. Many items may be implemented one-time, or continuously from that day forward. Here is where the communicating and “selling” of the plan occurs among firm members. Firm retreats and business development training is a useful method to ensure plan implementation.
4. **Monitoring:** Once the implementation stage is started the plan needs to be monitored using various measurement systems created to check progress, and then adjusted as needed. If you don't measure it, it won't get done.

Plan Checklist

The plan check list includes elements to consider when you develop your plan. Not all elements may be incorporated into the plan. It depends on your firm's particular situation. You can use this list as a guide as you move through the four step planning process and establish your goals, strategies, and tactics. [See complete list in *Law*



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Firm Organization Activities

- Establish marketing objectives and goals
- Review and/or create firm core values, mission and vision statements—who are you and where do you want to go?
- Firm SWOT analysis to determine where you are now
- Review billing model and alternate billing arrangements
- Review compensation plan in relation to business development incentives
- Job descriptions for all personnel: [responsibility, authority, accountability]
- Perform 10 dimensions of service quality exercise to come up with practical ideas to improve client relationships
- Practice areas (practice groups) description—organization
- Create an ideal client profile for each practice area
- Data base organization in Outlook™ or similar program
- Set up charts for tracking clients, prospects, network & referral sources
- Professional education

Firm Marketing Activities

- Create practice group business development plans for each practice area
- Create personal business development plans for each firm member responsible for business development
- Business Acquisition strategy
- Collateral materials
- Website
- Client Communications
- Advertising
- Speaking engagements
- Public relation activities

Plan Implementation Format

The plan implementation format is a practical way to organize and implement all the elements in your plan. You first establish your goals, perhaps three or four—depending on how broad you describe them—each goal will have a couple of strategies, and each strategy will have a couple of tactics. Look at this plan format as a comprehensive to-do list. [See complete list in *Law & Professional Service Firm Marketing & Business Development Plans]*

Definitions

1. Goals

A goal is a broad statement of why & what you will do; it should include a time frame and an amount, for example a dollar figure, if appropriate. You may have perhaps three to four goals per plan, but not too many as to become unwieldy.

2. Strategies

Strategies are specific statements of what you will do to accomplish your goal. You may have several strategies per goal.

3. Tactics

Tactics are detailed steps of how you will carry out your strategies—each strategy may have several tactics. It includes what, how, who, when, and at what cost if appropriate, to achieve your goal—truly a to-do list.

Example

Goal 1: Increase our revenues by 25% between now and December 31, 2010

Strategy 1: Increase business with existing clients

Tactic 1: Organize client data base into types of clients and services, practice areas and lawyers responsible for each client.



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Leadership and Follow Up

None of this will work without total commitment from everyone involved. For successful plan development and implementation it requires someone from the top to champion the process with enthusiasm and passion. It takes perseverance to make sure it happens.

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