



Raising the Bar 2012 Business Development Jump Start Planner

Instructions

*This fill-in-the-blank exercise should take a half hour (or less) to complete.
(If you would like a Word version of the form, email me at rhensley@raisingthebar.com)*

1. I will complete this form within _____ days. (I suggest that your goal be within 7 days. Pend this on your calendar now to check yourself in 7 days. RTB will even send you a reminder in 7 days to remind you of your commitment to yourself. Note: If you have not completed this form by then, you just may need a coach ☺ or a partner to hold you accountable so that you will complete the form and review it at least weekly.)

2. My three primary target clients for this year are:

3. For each most important prospective or existing client fill in the following:

• I will meet with (prospective client/existing client) _____ by (date) _____ for the purpose of _____.

• I will do research on (prospective client/existing client) by _____ (date).

• The three most important needs of this person are:

• I will ask the following questions of this person during my meeting:

4. The advances I will work toward during phone calls or meetings are:

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5. I will ask _____, my primary contact at _____ (client firm), to introduce me to two new people who work for that same client firm. (This is designed to expand your contacts with an existing client.)
6. I will reduce my reliance on _____ (client) from ____ percent of my revenues down to _____ percent.
7. I will conduct _____ (number) client satisfaction interviews with my clients this year. I will start with clients (list at least three) _____, _____, and _____ in the first quarter; and (list at least two) _____ and _____ in the second quarter. I will do these in person.
8. I will meet with _____ (number) prospective clients this quarter. These are people I know, but for whom I am not doing any business.
9. I will devote _____ hours to marketing and business development each week of this year. I will diligently keep track of the time I invest in this area.
10. I will meet with _____ (number) people in my network each quarter of this year. I will start by meeting with _____, _____, and _____.
11. I will meet with _____ (number) of my partners each quarter of this year. I will start by meeting with _____ by February 1, _____ by February 15, and _____ by March 1, etc.
12. I will meet or speak with _____ (number) referral sources each quarter of this year. I will start by calling _____ by January 30. The questions I will ask are:
 _____?
 _____?
 _____?
13. I will write _____ articles this year and place them in publications that my clients read. My target publications are _____ and _____.
14. I will speak _____ times during the year at industry or trade conferences where my prospective clients congregate. (Related questions: Where am I currently scheduled to speak and on what dates? How do I get on the agenda for those conferences? Do I know the name of the chair of the speakers committee? If not, can one of my clients or partners make an introduction or sponsor me as a speaker?)

15. I will learn the following new skills this year that will increase my value to the market. (For instance, I will learn about capital funding in the biotech field to better serve the needs of my environmental clients. I will learn how to use LinkedIn so I can better communicate with my referral sources.)

16. I will call dormant clients _____ and _____ by _____ (date) to ask them if they would like to receive the firm newsletter; or ask them to join a group/organization or speak to a group to which I belong.

17. My accountability partner to achieve the above is _____.
We will talk by phone at _____ a.m./p.m. each _____ (choose a day of the week).