

CLIENT DEVELOPMENT 101 FOR 2011 AND BEYOND



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**CORDELL
PARVIN LLC**

ABOUT CORDELL PARVIN

Cordell Parvin practiced law for more than 36 years. He was a Practice Group Leader and developed a highly successful national construction law practice. During his career, Cordell taught, mentored and coached young lawyers on their careers, professionalism, client management, and work-life balance.

At Jenkins & Gilchrist, PC, Cordell initiated and directed the firm's Attorney Development Program. He created a comprehensive program for associate development focused on skill development, mentoring, shadowing and career planning. Cordell motivated the leadership of his firm to get behind the associate development program and to focus attention on the importance of career planning.

He has a passion for teaching and coaching young lawyers. He recognizes that each lawyer has unique skills, talents and dreams. He works with lawyers as individuals and seeks to inspire and energize them based on their individual career and life dreams.

Client Development

Four Eras of Client Development

1. Do Good Work

2. Unsolicited Contact

3. Websites / Branding

4. Being Remarkable, Extraordinary, Memorable

**It is not what you know or who you know,
It is who knows what you know.**



Planning

There is great evidence supporting the conclusion that people with written goals and a plan to achieve them are far more likely to be successful. Energy and time are our most important resources. In order to use these resources effectively you must have a plan.

A well thought out plan will help you make better choices as you prioritize, focus and execute.

How does your reputation benefit your clients?

How does planning benefit your clients?

“Client focus” activities are things you do that give your current and potential clients a more accurate and reliable grasp of what you offer and who you are. It gives them important insights so they have realistic and healthy expectations.

“Firm Focus” activities are proactive things your firm does to continue to grow and develop your skills so that you can stay ahead of the curve and meet your client’s needs.

Most people aim at nothing in life
and hit it with amazing accuracy.

--Jim Cathcart

Target Market

Who is your target market?

What do you want your target market to hire you to do?

How can you become visible and credible to your target market?

What associations do your clients belong to?

What will be your referral sources?

2011 ATTORNEY BUSINESS PLAN

Name: _____

Date: _____

Your business plan is the key to organizing your non-billable hours and using your time wisely to accomplish your individual goals. Start with setting goals that will stretch you and energize you and then develop a plan to achieve them.

This worksheet is provided to assist you in developing your business plan for FY 2011. Under Roman Numeral III, there is a wide range of options. The wide range is merely to give you ideas. It is not intended for you to try to do all of the activities. To the contrary, it is more important focus on a few things and do them well. Careful planning and focus will increase your likelihood of success.

I. BUSINESS DEVELOPMENT GOALS FOR FY 2011

Describe briefly your three or four business development goals for 2011. They should be specific and, if possible, measurable (for example, making contact with _____ people a month; writing _____ articles; speaking at _____ industry meetings; development of a particular client or group of clients; bring in \$_____ business; increase business brought in to \$_____; increase collected production value to \$_____; provide \$_____ of business for associates in your practice group; expand business with ABC client by \$_____; obtain ____ new clients over next 12 months; and develop unique solution to a burning issue for clients in the _____ industry).

A. _____

B. _____

C. _____

D. _____

E. _____

II. TOTAL BILLABLE AND NON-BILLABLE HOURS

A. Billable Hours _____

B. Non-Billable Hours _____

Non-Billable Activities	
Firm Administration	
a.	
b.	
c.	
d.	
Profile Building (Section III)	
Relationship Building (See Section IV)	
CLE/Professional Improvement(Section V)	
<i>Pro Bono</i> (Section VI)	

Total Billable and Non-Billable Hours:_____

III. PROFILE BUILDING

A In this section, focus on your profile/reputation building activities. In each category, indicate how you plan to proceed. Recognize that for most lawyers business development activities done today are not likely to generate revenue right away, so be patient.

B. Professional/Bar Organizations

Name of Organization	Membership Composition	My Activity/ Role		

Estimated number of hours: _____

C. Community, Civic, Political or Charitable organizations

Name of Organization	Membership Composition	My Activity/ Role			

Estimated number of hours: _____

D. Trade and Industry Associations

Name of Organization	Membership Composition	My Activity/ Role (Presentations, Meetings, Writing etc.)			

Estimated number of hours: _____

E. Books, articles and other writing for publication:

Subject	Publication (if known)			

Estimated number of hours: _____

IV. RELATIONSHIP BUILDING

A. Existing and Potential Client Contacts.

Client/Potential Client Name			Actions to be Taken (Visits, Roundtables, Workshops etc.)	Target Date

Estimated number of hours: _____

B. Existing or potential referral sources

Referral Source Name	Presently Referring? (Y/N)	Clients Referred	Actions to be Taken (Visits, Workshops etc.)	Target Date

Estimated number of hours: _____

Estimated number of hours: _____

C. New client development RFPs, presentation teams, etc.):

Prospect	Activity	Resources Needed	Actions to be Taken	Target Date

Estimated number of hours: _____

D. Internal marketing activities (marketing training, firm database, office marketing initiatives, practice group marketing initiatives, etc.):

Activity	Contribution I Can/Will Make	Target Date

Estimated number of hours: _____

V. CONTINUING EDUCATION/PROFESSIONAL IMPROVEMENT

A. Legal Education

Activity: _____

Location: _____

Estimated number of hours: _____

B. Industry/Business Education:

Activity: _____

Location: _____

Estimated number of hours: _____

C. Leadership, Writing, Speaking or Management education:

Activity: _____

Location: _____

Estimated number of hours: _____

VI. PRO BONO

A. Activity: _____

Location: _____

Estimated number of hours: _____

Goals

What are your goals and why is it important to you to achieve them? If you do not have a good answer as to why achieving your goals are important to you, then you won't have the discipline and the commitment to achieve your goals.

What do you need to overcome to achieve your goals?

What obstacles are you likely to face?

Who can help you both in and out of the firm?

90 Day Goals

Experience has shown that if you write down your goals and develop a plan of activities to achieve them, you will be one of about 3% of lawyers and you will be far more likely to achieve your goals.

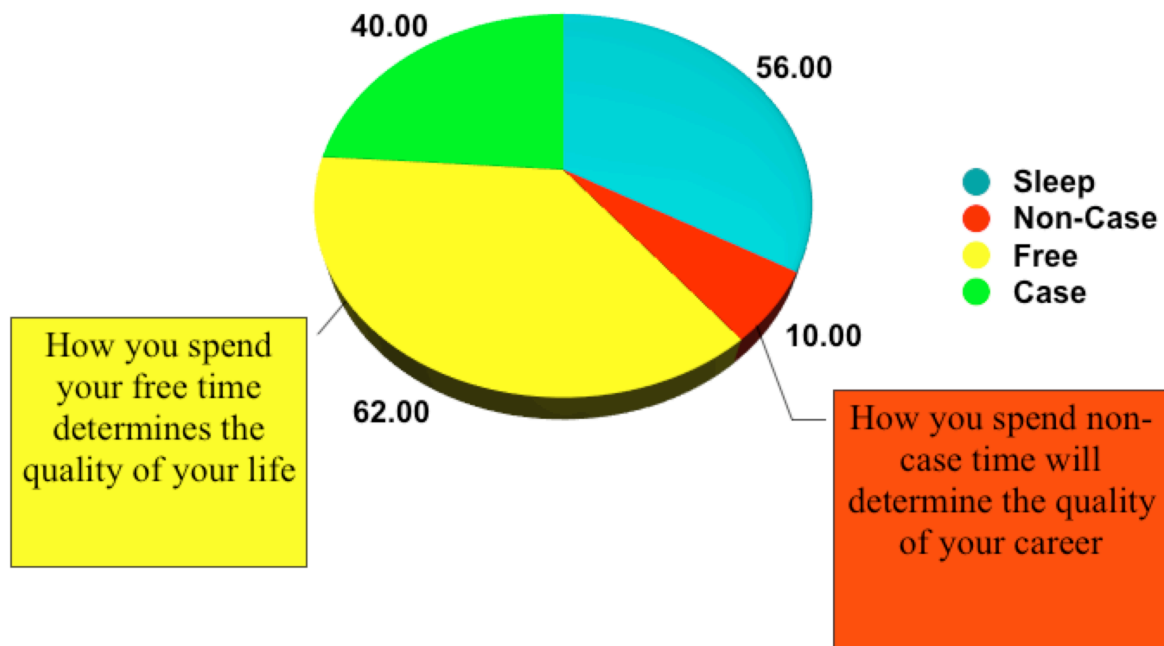
I have always had lifetime goals. I put my lifetime goals in four categories:

Physical/Economic
Mental/Learning
Emotional/Relationships
Spiritual/Values

List your goals and as many actions as you can think of that you will need to take to achieve the goal.

GOAL	ACTION ITEM

How You Spend Your Time Weekly



RECOMMENDED READING

Being a Lawyer

"True Professionalism" by David Maister
"Lawyer Life" by Carl Horn
"Transforming Practices" by Steven Keeva
"How to Argue and Win Every Time" by Gerry Spence
"To Kill a Mockingbird" by Harper Lee

Business

"Built to Last: Successful Habits of Visionary Companies" by Jim Collins & Jerry Porras
"Good to Great: Why Some Companies Make the Leap....and Others Don't" by Jim Collins
"Gung Ho" by Ken Blanchard & Sheldon Bowles
"Jack Welch and the GE Way: Management Insights and Leadership Secrets of the Legendary CEO" by Robert Slater
"Raving Fans" by Ken Blanchard & Sheldon Bowles
"The Four Obsessions of an Extraordinary Executive" by Patrick Lencioni

Business Development

"Clients for Life: Evolving from an Expert-for-Hire to an Extraordinary Advisor" by Jagdish N. Sheth and Andrew Sobel
"Making Rain: The Secrets of Building Lifelong Client Loyalty" by Andrew Sobel
"The Trusted Advisor" by David Maister, Charles Green & Robert M. Galford

Interpersonal Skills

"How to Work a Room: The Ultimate Guide to savvy Socializing in Person and Online" by Susan RoAne
"How to Connect in Business in 90 Seconds or Less" by Nicholas Boothman
"How to Talk to Anyone: 92 Little Tricks for Big Success in Relationships" by Leil Lowades
"Never Eat Alone" by Keith Ferrazzi
"Likeability Factor" by Tim Sanders

Leadership

"Aligning the Stars" by Jay Lorsch & Thomas Tierney
"Beyond Success: The 15 Secrets to Effective Leadership and Life Based on Legendary Coach John Wooden's "Pyramid of Success" by Brian Biro & John Wooden
"First Among Equals" by Patrick McKenna & David Maister
"Managing the Professional Service Firm" by David Maister
"Principle-Centered Leadership" by Stephen Covey
"Leadership From The Inside Out" by Kevin Cashman
"Contented Cows Give Better Milk" by Bill Catlette & Richard Hadden
"The Leadership Engine" by Noel Tichy with Eli Cohen
"Leading With the Heart" by Mike Krzyzewski

Life

"The 7 Habits of Highly Effective People" by Stephen Covey
"The Power of Full Engagement" by Jim Loehr and Tony Schwartz
"First Things First" by Stephen Covey, Roger Merrill & Rebecca Merrill
"Man's Search for Meaning" by Viktor E. Frankel
"Goals" by Brian Tracy
"Overachievement" by John Eliot, Ph.D.
"The Power of Purpose" by Richard J. Leider

"Getting Things Done" by David Allen

"The Ultimate Guide to Mental Toughness" by Daniel Teitelbaum

Emotional Intelligence/Personality Profiles

"Selling with Emotional Intelligence" by Mitch Anthony

"Emotional Intelligence" by Daniel Goleman

"Emotional Intelligence at Work" by Hendrie Weisinger, Ph.D.

Marketing and Sales

"The Dip" by Seth Godin

"Heavy Hitter Selling: How Successful Salespeople Use Language and Intuition to Persuade Customers to Buy" by Steve W. Martin

"High Trust Selling" by Todd Duncan

"Made to Stick" by Chip Heath, & Dan Heath

"Selling with Emotional Intelligence" by Mitch Anthony

"The Tipping Point" by Malcolm Gladwell

"Word of Mouth Marketing" by Andy Sernovitz

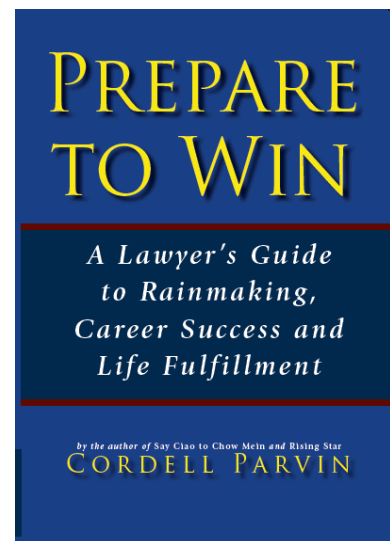
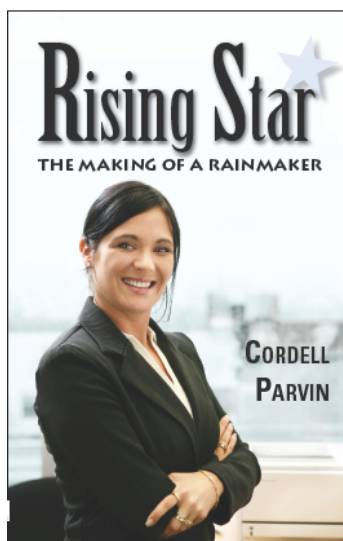
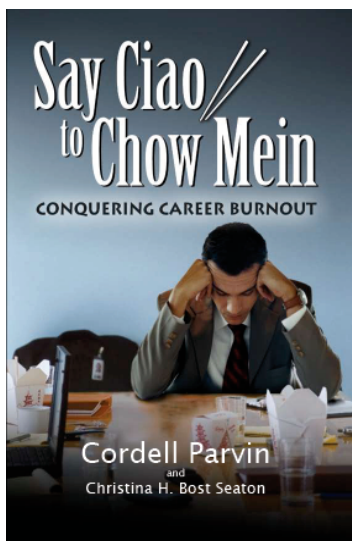
"You, Inc." by Harry Beckwith and Christine Clifford Beckwith

Presentation Skills

"10 Simple Secrets of the World's Greatest Business Communications" by Carmine Gallo

"Beyond Bullet Points" by Cliff Atkinson

"Presenting to Win: The Art of Telling Your Story" by Jerry Weissman



Available at: <http://cordellparvin.com>