



# Personal Marketing Worksheet

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Years at Firm: \_\_\_\_\_ Years in Profession: \_\_\_\_\_ Prof. Certifications \_\_\_\_\_

Practice Emphasis: \_\_\_\_\_

Trade associations or community groups in which I am active:

1. \_\_\_\_\_ 2. \_\_\_\_\_

My largest clients and their industry:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

My best referral relationships / sources or referrals:

1. \_\_\_\_\_ 2. \_\_\_\_\_

Three clients I'd like to get:

Organization Name

Highest level contact whom I know / Title

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Of all the non-billable time you spend on any form of practice development, estimate what proportion you spend targeting individual, specific clients or prospects versus time spent in "broadcast" activities trying to reach a broader audience. (Seminars, speeches, general community activities, newsletters, etc.)

\_\_\_\_\_% Single Prospect Efforts

\_\_\_\_\_% Broadcast efforts

Preferred marketing activities (circle no more than three):

Writing articles

Giving speeches

Doing research

Association involvement

Cold calling

Proposal writing

What is the firm doing right in marketing? \_\_\_\_\_

What would I change in how we market the firm? \_\_\_\_\_