Revenue Wise

Business Development Assessment

Use this assessment to determine how you compare to other successful attorneys and what's needed to grow your book of business.

REVENUE WISE

THE SMART WAY TO GROW

Version 1.7a

Start Here

Getting Started

The first step in becoming a better business developer is to assess where you are starting from. By completing the assessment on the following pages, you will learn what you have in place, what you know and what's missing. This will give you a quick snapshot of what it will take to improve.

"What Are You Solving for?"

In all my consulting assignments, I always begin by asking "what are we solving for?" This ensures we are clear on what we want to accomplish.

I am going to assume you want to accomplish the following:

- You want to grow a larger, more sustainable book of business.
- You want to generate stimulating, enjoyable work with clients you like.
- You want to build your brand as a "Recognized Expert" in your practice specialty.

Why Don't You Have What You Want?

Based on my 20 years of experience coaching and training more than 2000 attorneys across the United States in business development, I can safely say that if you don't have the above results in the quantity, quality or at the pace you want them, then you have gaps in one or more of these areas:

- **Do you know what to do?** There are specific elements you need to develop and proven skills you need to learn, if you are going to succeed.
- **Are you willing to do what is required?** You need to be willing to make the necessary investment in time, effort, and getting outside your comfort zone.
- **Are you actually doing it?** This is the "foot-work" stage. You need to complete the deliverables, learn the skills, develop the habits and do the things that lead to success.
- **Are you doing it well?** When you execute, you need to be effective. This requires testing, practicing and fine-tuning your approach.
- **Do you need help?** All top performers have coaches, mentors or make extensive use of the best practices found in self-study training materials.

To find out if you need help, complete the assessment below.

Your Results & Activities

Your Financial Results Status >	Yes/No
Relative Performance. In my "class" (e.g. equity partner, income partner, associate) to the extent it is possible at my firm, I know that my originations are in the top 50%.	☐
My Own Clients. Over 75% of my work comes from my own clients, that I originated.	☐
Hit Originations. For each of the last two years, I set and achieved origination goals that were higher than my previous year's results.	☐
Make Hours. I have met or exceeded my billable hours target in each of the last two years.	☐
Score	0%

Reset Section

Your Performance Status >	Yes/No
Win Pitches. On average, I win at least half of my pitches/proposals/RFPs.	☐
Visibility & Credibility. I have built a "personal brand" that distinguishes me from the other attorneys in my chosen field. This brand awareness generates regular referrals.	☐
Ideal Clients. The majority of my clients are of the type and size I like, give me good and stimulating work and are enjoyable to work with.	☐
Happy Clients. The majority of my clients would say I do excellent legal work, deliver great results and would be happy to refer me to their friends and colleagues.	☐
Score	0%

Reset Section

Your Activities Status >	Yes/No
A Bias for Action. No matter how busy I am, I make time to do business development.	☐
Meet New Contacts. I participate in activities where I meet at least two-to-four new prospective clients or referral sources per month.	☐
Nurture Contacts. I conduct at least two "high-value" business development activities each week. (E.g. speak, meal, in-depth phone call, attend event, send content, etc.)	☐
Nurture Best Clients. At least monthly, I contact my best clients and do something of "extra value" for them at no charge. These contacts are outside of my ongoing/typical work communications.	☐
Maintain Contact List. I maintain a list of my best clients and contacts, noting what has transpired, what I need to do next and when.	☐
Make LinkedIn Connections. I make at least two LinkedIn connections per week.	☐
Post Online Content. I post at least one piece of content on LinkedIn or some other online platform each month.	☐
Give Presentations. I give at least two presentations a year (either in-house or at a conference or event).	☐
Score	0%

Reset Section

Your Practice & Skills

Your Practice Status >	Yes/No
Practice Focus. I have defined a clear practice focus. I have selected a target client/industry, determined their true needs and problems, and defined a service that solves these needs in a way that is superior to my competitors.	☐
Business Development Plan. Each year, I develop a biz dev plan that details my goals, financial targets and the tactics that will help me achieve them.	☐
Verbal Business Card. I have developed an authentic and memorable response to the question “what do you do?”	☐
LinkedIn Profile. I have a comprehensive LinkedIn profile that showcases my practice focus and most significant skills.	☐
LinkedIn Connections. I have invited all my appropriate contacts to connect with me on LinkedIn.	☐
Score	0%

Reset Section

Your Skills Status >	Yes/No
Sales/Pitch Process. I have learned a formal, consultative sales process that I use for one-on-one sales meetings and formal pitch meetings. I am effective at leading these meetings.	☐
Verbal Business Card Delivery. When I deliver my Verbal Business Card to prospective clients I make a good impression and often end up exchanging physical business cards.	☐
Attend Conferences. I get the most from conferences and events. I know what to do before, during, and after to get the most value from attending.	☐
Networking Events. I learned how to effectively participate in networking events. While I may not like attending, I have learned how cultivate new relationships and advance existing ones.	☐
Presentation Marketing. I have developed a “Signature Talk” (presentation) that showcases my unique expertise and skills. I know how to use this talk to generate new prospects, convert existing ones and grow clients.	☐
Score	0%

Reset Section

Understanding Your Score

Ratings by Section

Your Financial Results	0%

Section	Section Rating
Your Performance	0%
Your Activities	0%
Your Practice	0%
Your Skills	0%
Biz Dev Rating	0%

Interpreting Your Score

Reset Form

The table above will give a snapshot of how you are doing in each area and where you need to improve.

Level	Explanation
	A red score indicates you are deficient in this area and need to improve.
	A yellow score indicates you are doing okay, but there is room for improvement.
	A green score indicates you are doing well in this area.

David Adams Biography

David Adams is a seasoned coach, author and speaker. He has more than 20 years of experience helping attorneys and firm leaders improve their business development and leadership skills. David is an expert at helping lawyers and practice groups develop the attitudes, behaviors, and capabilities necessary for success.

He helps attorneys achieve the ideal combination of professional success and personal fulfillment.

As the founder of Revenue Wise, David has worked with hundreds of lawyers, at all levels of seniority, at such firms as Orrick, Herrington & Sutcliffe; Polsinelli; Locke Lord; Fenwick & West; Latham & Watkins; Littler Mendelson; Kilpatrick Townsend & Stockton; Holland & Hart; Keker, Van Nest & Peters; and Farella Braun + Martel.

As a coach, consultant and trainer, David is focused on producing measurable results and helping lawyers overcome the internal and external obstacles to success in business development. Many firms have adopted the Revenue Wise approach to business development.

David works with practice groups to refocus their efforts, reposition them in the marketplace, formulate effective plans, promote teamwork among leaders and members, and create systems of accountability that help them achieve their objectives.

David also works with firm management and leaders to develop effective growth strategies and plans, implement cross-selling programs, develop the next generation of leaders, help the management committee work more effectively together and facilitate effective retreats and meetings.

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Revenue Wise Services

Revenue Wise is a full-service firm that specializes in helping law firms grow revenue. We use a combination of coaching, training, and consulting to help lawyers, practice groups, and law firms become more successful. We count some of the nation's top firms as our clients, including Orrick, Herrington & Sutcliffe; Polsinelli; Locke Lord; Fenwick & West; Latham & Watkins; Littler Mendelson, Kilpatrick Townsend & Stockton; Holland & Hart; Keker, Van Nest, & Peters; and Farella Braun + Martel.

Program	Description
Business Development Coaching	Individual Business Development Coaching. This program is typically delivered over nine months and includes thirteen coaching sessions. Participants also get access to all the biz dev training content in our cloud-based learning center.
Business Development Training	Live webinar-based Business Development Training. Includes access to the ten training modules on our cloud-based learning center. All webinars are recorded and posted on the learning center for later viewing.
AudienceFIRST Presentations	The AudienceFIRST Presentations program is the only presentation development program designed exclusively to help attorneys generate new contacts and clients from their talks. It will also help them develop more engaging and memorable presentations and improve their presentation skills. It can be delivered onsite or via webinar.
Cross-Selling Program	Our Cross-Selling Program is based on a proven methodology that delivers real revenue growth and overcomes the problems that plague these types of initiatives. It is designed to helps both individual attorneys and practice groups improve their cross-selling ability and success rate.
Practice & Industry Groups Program	Our PracticeLaunch Program does for groups what our business development programs do for individuals — it helps them define a market-winning focus, develop the necessary materials, write a Go-To-Market Biz Dev Plan and provides the support needed to successfully execute their plan.
Leadership Program	Our Leadership Program helps leaders develop their leadership skills and grow their group's revenue. More than almost any type of leader, a law firm leader must maintain a "triple-focus" — simultaneously achieving objectives in three key areas: revenue growth, client service, and team development. We offer this program in both group training and one-on-one coaching formats.
Firm and Group Retreats	We help law firms and practice groups of all sizes deliver successful retreats. Our participation has ranged from designing, developing and facilitating entire retreats; helping firms develop Superior Service Offerings; conducting strategic planning activities; resolving thorny issues; and speaking on specific subjects, like business development, leadership and law firm innovation.