

LC Orientation: BD Action Planning Guide

Use this guide to help you to plan your short-term and long-term business development goals, and then identify and prioritize specific next steps.

Key 1-2 business development goals, over the next 12 months:
Goal 1:
Goal 2:
Top 3-5 business development strategies to implement this quarter:
Strategy 1:
Strategy 2:
Strategy 3:
Strategy 4:
Strategy 5:

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Key relationships to build/expand this quarter: Internally at BKD, industry community, prospect/client-level:
Relationship 1:
Relationship 2:
Relationship 3:
Relationship 4:
Relationship 5:

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Questions to Ask

Below are some reflection questions to ask as you're determining BD goals and action plans.

When **goal setting**:

- What impacts will this goal have on me personally, and on BKD?
- What excites me about the goal?
- What am I willing to commit (daily/weekly/quarterly) to accomplishing the goal?

When **examining my relationships in accomplishing the goal**:

- **Where am I strong?** Am I consistent with contributing value to these relationships? Am I balancing those contributions with making asks?
- **Where are the relationship gaps?** Either no relationship today, or a relationship where I can and should be providing more value.
- **Where can I stretch?** It's important to have relationships up, down, and across – both internally and externally. Stretch relationships are usually beyond our comfort zone. Think industry thought leaders, executives, community leaders.

When **action planning**:

- What step am I taking *today* to make forward progress toward my goal?
- What are the top 3-5 BD priorities that need my focus in the next quarter? The next 6 months? The next 12 months?
- What will I need to accomplish these priorities?
- Do I need a coach or accountability partner to move me forward?