

Define the goals for your practice for the next year with a checklist. Here are some items to get you started:

- Determine the amount of business you want**
It could be new clients, a dollar amount, or both.
- Establish opportunities to connect throughout the year**
How can you generate more referrals and help clients find you?
- Continuously expand your ability to reach new people**
Are your clients looking for you on social media or local newspapers?
- Examine your prospecting process**
How many people do you need to contact each week or month?
- Track your ability to generate new retainers**
How many potential new clients call, schedule initial consultations, and decide to retain your firm each month?
- Thank clients for their business**
Try a card, call, email, or video and see what works best.
- Ask for feedback on the service you provide**
Leverage a call, email or print survey to ask for referrals.



WE'RE COMMITTED TO YOUR SUCCESS – TURN THE PAGE TO START TRACKING YOUR GROWTH!



Your Practice Success Calendar

Track your marketing, recruiting, and retention success each month to meet your goals.

Annual Revenue Goal: _____ Average Flat Fee: _____ Monthly Retainer Goal: _____

		SUN	MON	TUES	WED	THUR	FRI	SAT
Week 1	Initial Calls							
	Consultations							
	Retainers							
Week 2	Initial Calls							
	Consultations							
	Retainers							
Week 3	Initial Calls							
	Consultations							
	Retainers							
Week 4	Initial Calls							
	Consultations							
	Retainers							
Week 5	Initial Calls							
	Consultations							
	Retainers							
Week 6	Initial Calls							
	Consultations							
	Retainers							

Total Initial Calls: _____ Total Consultations: _____ Total Retainers: _____