

Successful business development requires a proactive and organized approach.

On the following pages you will find a sample of such an approach, along with a worksheet for plotting your annualized business development plan for this year...

By plotting your approach on the worksheet you'll be able to gauge the overall scope, allocate time and resources and take advantage of any seasonal opportunities that might be associated with your product or service.

**Please note: the two key reasons we've found for a failed or sub-optimal business development effort are
lack of organization (strategy) & the inability to stick with it (persistence);
this organizational tool will help on both fronts.**

1. Enter planned activities in each column, taking budget, revenue goals & seasonal variations into account (SEE SAMPLE SHEET)
2. Try to balance your approach (i.e., mix direct mail such as letters, postcards or newsletters with e-marketing, such as e-newsletters, e-zines, e-announcements etc)
3. Create a plan that fits into a reasonable time expectation – scheduling these activities is important, as many people procrastinate these activities. We must make time to succeed!

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*"Helping people sell more
 & communicate better"*

	ADVERTISING & PROMOTION	NETWORKING & SOCIAL MEDIA	E-MARKETING	DIRECT MAIL	TELEPHONE FOLLOW-UP	APPOINTMENTS & ENTERTAINING	CUSTOMER RETENTION
JAN	\$200 ad – chamber Newsletter Press release if appropriate	Business association breakfast / event 1 hour per week * FB / LI / TW / Blog	E-Newsletter to clients/prospect list	Semi-annual letter to customers	Call prospects met at networking events	Lunch with at least one prospect At least # prospect appointment (s)	Lunch with at least one customer Semi-annual letter to customers
FEB	Press release if appropriate	Business association breakfast / event 1 hour per week * FB / LI / TW / Blog	Web site optimization	Post card mailer to select members of prospect list	Follow-up calls to postcard mailing	Lunch with at least one prospect At least # prospect appointment (s)	Lunch with at least one customer
MAR	\$___ print ad or broadcast ads; Press release if appropriate	Business association breakfast / event 1 hour per week * FB / LI / TW / Blog	- SAMPLE -			Lunch with at least one prospect At least # prospect appointment (s)	Lunch with at least one customer
APR	Press release if appropriate	Business association breakfast / event 1 hour per week * FB / LI / TW / Blog	E-Newsletter to clients/prospect list	10 Follow-up or Thank You notes to customers or prospects	Follow-up calls to postcard mailing	Lunch with at least one prospect At least # prospect appointment (s)	Lunch with at least one customer
MAY	\$___ print ad or broadcast ads; Press release if appropriate	Business association breakfast / event 1 hour per week * FB / LI / TW / Blog	E-invitations to customer appreciation event	Mail-piece / letter / invitation to customer appreciation event	Follow-up calls to invitations	Lunch with at least one prospect At least # prospect appointment (s)	Lunch with at least one customer
JUN	Customer appreciation event Press release if appropriate	Business association breakfast / event 1 hour per week * FB / LI / TW / Blog		10 Follow-up or Thank You notes to customers or prospects	Follow-up calls to postcard mailing	Lunch with at least one prospect At least # prospect appointment (s)	Lunch with at least one customer

* Facebook (FB); LlinkedIn (LI); Twitter (TW); Your organization's blog

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2012 Business Development Action Plan
Worksheet – Page 1

	ADVERTISING & PROMOTION	NETWORKING & SOCIAL MEDIA	E-MARKETING	DIRECT MAIL	TELEPHONE FOLLOW-UP	APPOINTMENTS & ENTERTAINING	CUSTOMER RETENTION
JAN							
FEB							
MAR							
APR							
MAY							
JUN							

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2012 Business Development Action Plan
Worksheet – Page 2

	ADVERTISING & PROMOTION	NETWORKING & SOCIAL MEDIA	E-MARKETING	DIRECT MAIL	TELEPHONE FOLLOW-UP	APPOINTMENTS & ENTERTAINING	CUSTOMER RETENTION
JUL							
AUG							
SEP							
OCT							
NOV							
DEC							