|  |  |
| --- | --- |
|  | Individual business development plan |

In filling out this document, you’ll need to reference your Creating KPIs and Targets spreadsheet for supporting metrics. You’ll also need to track actual effort and performance measures in that spreadsheet.

**Name:** Enter name

Summary

**KPIs**

Please copy from your KPIs and targets spreadsheet.

|  |  |  |  |
| --- | --- | --- | --- |
| **KPI type** | **Per year** | **Per week** | **Per day** |
| Communications | Enter # | Enter # | Enter # |
| Meetings | Enter # | Enter # | Enter # |

**Targets**

Please copy from your KPIs and targets spreadsheet.

|  |  |  |
| --- | --- | --- |
| **Source of new business** | **In $’s** | **As a % of total** |
| Clients (new business) | Enter dollar amount | Enter % |
| Clients (referrals) | Enter dollar amount | Enter % |
| Colleagues | Enter dollar amount | Enter % |
| Wheels of influence | Enter dollar amount | Enter % |
| Centers of influence | Enter dollar amount | Enter % |
| Strategic alliance partners | Enter dollar amount | Enter % |
| Unsolicited lead generation | Enter dollar amount | Enter % |
| **Totals** | Enter dollar amount | Enter % |

Effort and performance goals

The following lists key contacts who you plan to cultivate, outlines business development strategies you plan to pursue and lays out a budget for each source of new business type listed in your KPIs and targets spreadsheet.

**Generating new business and referrals from current clients**

The following lists the key clients you will cultivate:

|  |  |
| --- | --- |
| **“A” clients** | Enter names |
| **“B” clients** | Enter names |
| **“C” clients** | Enter names |

The following outlines key strategies you will employ to cultivate these clients:

|  |  |
| --- | --- |
| **Strategy 1** | Enter strategy |
| **Strategy 2** | Enter strategy |
| **Strategy 3** | Enter strategy |

The following summarizes budget requirements associated with the cultivation of these clients:

|  |  |
| --- | --- |
| **Expense description** | **$’s** |
| Enter text | Enter dollar amount |
| Enter text | Enter dollar amount |
| Enter text | Enter dollar amount |

**Generating referrals from current and former colleagues**

The following lists the key current and former colleagues you will cultivate:

|  |  |
| --- | --- |
| **“A” contacts** | Enter names |
| **“B” contacts** | Enter names |
| **“C” contacts** | Enter names |

*Note: the number of names should correspond to the number of names listed in your KPIs and targets spreadsheet*

The following outlines key strategies you will employ to cultivate these current and former colleagues:

|  |  |
| --- | --- |
| **Strategy 1** | Enter strategy |
| **Strategy 2** | Enter strategy |
| **Strategy 3** | Enter strategy |

The following summarizes budget requirements associated with the cultivation of these current and former colleagues:

|  |  |
| --- | --- |
| **Expense description** | **$’s** |
| Enter text | Enter dollar amount |
| Enter text | Enter dollar amount |
| Enter text | Enter dollar amount |

**Generating referrals from wheel of influence contacts**

The following lists the key wheels of influence you will cultivate:

|  |  |
| --- | --- |
| **“A” contacts** | Enter names |
| **“B” contacts** | Enter names |
| **“C” contacts** | Enter names |

*Note: the number of names should correspond to the number of names listed in your KPIs and targets spreadsheet*

The following outlines key strategies you will employ to cultivate these wheels of influence:

|  |  |
| --- | --- |
| **Strategy 1** | Enter strategy |
| **Strategy 2** | Enter strategy |
| **Strategy 3** | Enter strategy |

The following summarizes budget requirements associated with the cultivation of these wheels of influence:

|  |  |
| --- | --- |
| **Expense description** | **$’s** |
| Enter text | Enter dollar amount |
| Enter text | Enter dollar amount |
| Enter text | Enter dollar amount |

**Generating referrals from center of influence contacts**

The following lists the key centers of influence you will cultivate:

|  |  |
| --- | --- |
| **“A” contacts** | Enter names |
| **“B” contacts** | Enter names |
| **“C” contacts** | Enter names |

*Note: the number of names should correspond to the number of names listed in your KPIs and targets spreadsheet*

The following outlines key strategies you will employ to cultivate these centers of influence:

|  |  |
| --- | --- |
| **Strategy 1** | Enter strategy |
| **Strategy 2** | Enter strategy |
| **Strategy 3** | Enter strategy |

The following summarizes budget requirements associated with the cultivation of these centers of influence:

|  |  |
| --- | --- |
| **Expense description** | **$’s** |
| Enter text | Enter dollar amount |
| Enter text | Enter dollar amount |
| Enter text | Enter dollar amount |

**Generating referrals from strategic alliance partner contacts**

The following lists the key strategic alliance partners you will cultivate:

|  |  |
| --- | --- |
| **“A” contacts** | Enter names |
| **“B” contacts** | Enter names |
| **“C” contacts** | Enter names |

*Note: the number of names should correspond to the number of names listed in your KPIs and targets spreadsheet*

The following outlines key strategies you will employ to cultivate these strategic alliance partners:

|  |  |
| --- | --- |
| **Strategy 1** | Enter strategy |
| **Strategy 2** | Enter strategy |
| **Strategy 3** | Enter strategy |

The following summarizes budget requirements associated with the cultivation of these strategic alliance partners:

|  |  |
| --- | --- |
| **Expense description** | **$’s** |
| Enter text | Enter dollar amount |
| Enter text | Enter dollar amount |
| Enter text | Enter dollar amount |

**Generating new business from unsolicited lead generation**

The following lists the key unsolicited lead generation campaigns you will pursue:

|  |  |
| --- | --- |
| **“A” campaigns** | Enter text |
| **“B” campaigns** | Enter text |
| **“C” campaigns** | Enter text |

The following outlines key strategies you will employ to pursue these unsolicited lead generation campaigns:

|  |  |
| --- | --- |
| **Strategy 1** | Enter strategy |
| **Strategy 2** | Enter strategy |
| **Strategy 3** | Enter strategy |

The following summarizes budget requirements associated with these unsolicited lead generation campaigns:

|  |  |
| --- | --- |
| **Expense description** | **$’s** |
| Enter text | Enter dollar amount |
| Enter text | Enter dollar amount |
| Enter text | Enter dollar amount |

**Other comments**

Enter text