FRACTIONAL LAW FIRM

CMO

THE 4X4 PLAN [™]
4 AREAS, 4 QUARTERS

QUARTERLY MARKETING GOALS ASSESSMENT

THE 4X4 PLAN 4 AREAS, 4 QUARTERS



		NAME	DATE/
Complete this form at the start of each quarter. be reasonably achieved within a three-month p		•	-
Financial Goals			
Origination	Billable Hours	s	
Business/Client Development Goals			
Examples: successfully cross-sell another practice solicit client feedback, visit an out-of-town client	=		
1.	2		
Brand Goals			
Examples: Post at least once weekly on Linkedl podcast, establish a Twitter cadence, partner w	•	• •	firm advisory, guest host a
1	2		
Networking Goals			
Examples: Add 100 new connections on Linked sources, reconnect with five law school classma		etworking event each	n month, cultivate two new referral
1	2		

End of Quarter Reflection

At the conclusion of each quarter, reflect on your progress. What did you accomplish? What habits are repeatable for the next quarter? For yet-to-be-completed goals, what roadblocks prevented you from success? What adjustments should be made?



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DATE

nancial Goals	
igination	Billable Hours
siness/Client Development	Goals
	er practice area to an existing client, take a tour of a client's facility or office, formally own client, deliver an in-house training program to a client or prospect, etc.
	2
	2
	Z
and Goals	Z
and Goals amples: Post at least once weekly o	LinkedIn, speak at an industry conference, publish a firm advisory, guest host a artner with a client to film a video, etc.
and Goals amples: Post at least once weekly on dcast, establish a Twitter cadence, p	n LinkedIn, speak at an industry conference, publish a firm advisory, guest host a artner with a client to film a video, etc.
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inancial Goals	
Origination	Billable Hours
Business/Client Development Goals	
	ice area to an existing client, take a tour of a client's facility or office, formally nt, deliver an in-house training program to a client or prospect, etc.
l	2
rand Goals	
Brand Goals xamples: Post at least once weekly on Linkedlodcast, establish a Twitter cadence, partner w	In, speak at an industry conference, publish a firm advisory, guest host a vith a client to film a video, etc.
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kamples: Post at least once weekly on Linkedl odcast, establish a Twitter cadence, partner w	vith a client to film a video, etc.
xamples: Post at least once weekly on Linkedl odcast, establish a Twitter cadence, partner w	In, attend at least one networking event each month, cultivate two new referral

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THE 4X4 PLAN: TH



	NAME	DATE/
-	th quarter. Aim for S.M.A.R.T. goals (specific, mean- e-month period. At the end of each quarter, refle	
Financial Goals		
Origination	Billable Hours	
Business/Client Developmen	t Goals	
•	ther practice area to an existing client, take a tou town client, deliver an in-house training progran	•
1	2	
Brand Goals		
	on LinkedIn, speak at an industry conference, pul partner with a client to film a video, etc.	blish a firm advisory, guest host a
1	2	
Networking Goals		
Examples: Add 100 new connections sources, reconnect with five law scho	on LinkedIn, attend at least one networking ever ol classmates, etc.	nt each month, cultivate two new referral
1	2	

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