

FRACTIONAL LAW FIRM

CMO

THE 4X4 PLAN™

4 AREAS, 4 QUARTERS

QUARTERLY MARKETING GOALS ASSESSMENT

NAME _____ DATE ___/___/___

Complete this form at the start of each quarter. Aim for **S.M.A.R.T. goals** (specific, measurable, achievable, realistic, timely) that can be reasonably achieved within a three-month period. At the end of each quarter, reflect on your progress before setting new goals.

Financial Goals

Origination _____

Billable Hours _____

Business/Client Development Goals

Examples: successfully cross-sell another practice area to an existing client, take a tour of a client's facility or office, formally solicit client feedback, visit an out-of-town client, deliver an in-house training program to a client or prospect, etc.

1. _____

2. _____

Brand Goals

Examples: Post at least once weekly on LinkedIn, speak at an industry conference, publish a firm advisory, guest host a podcast, establish a Twitter cadence, partner with a client to film a video, etc.

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Networking Goals

Examples: Add 100 new connections on LinkedIn, attend at least one networking event each month, cultivate two new referral sources, reconnect with five law school classmates, etc.

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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?

Now, repeat this process for the next quarter.



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