



individual business & marketing plan

Date \_\_\_\_\_

ACCOUNTANT: \_\_\_\_\_

**I. EXTERNAL ACTIVITIES**

Indicate activities that you will personally undertake to accomplish in the following categories:

**A. Memberships.**

I will become an active member in:

**1. Your Industry Specific Organization Committees**

- a.
- b.
- c.

**2. Civic or Professional Organizations**

- a.
- b.
- c.

**B. Leadership.**

I will work towards serving in a leadership position in the following:

| <u>Association/Organization</u> | <u>Position Desired Attained</u> | <u>Target Date</u> |
|---------------------------------|----------------------------------|--------------------|
|                                 |                                  |                    |
|                                 |                                  |                    |
|                                 |                                  |                    |
|                                 |                                  |                    |
|                                 |                                  |                    |



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**C. Seminars and Presentations.**

I will participate in the planning of the following FIRM or outside sponsored seminar, as a primary or panel speaker: **(if none are scheduled, please suggest topics)**

| <u>Seminar Topic</u> | <u>Target Audience</u> | <u>Target Date</u> |
|----------------------|------------------------|--------------------|
|                      |                        |                    |
|                      |                        |                    |
|                      |                        |                    |
|                      |                        |                    |
|                      |                        |                    |

**D. Articles.**

I will prepare the following articles as a primary or co-author: **(otherwise suggest article topics)**

| <u>Topic</u> | <u>Target Audience</u> | <u>Target Date</u> |
|--------------|------------------------|--------------------|
|              |                        |                    |
|              |                        |                    |
|              |                        |                    |
|              |                        |                    |
|              |                        |                    |

**E. Personal Development.**

I would like to undertake the following activities to help me develop my personal skills and level of professionalism:

**CPEs, courses, films or tapes:**

**Teaching or lecturing opportunities:**

**Other:**



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**II. BUSINESS DEVELOPMENT ACTIVITIES**

**A. Client Development and Retention.**

Identify existing clients whom you will entertain by way of lunches, dinners, etc.:

| <u>Company Name</u> | <u>Contact</u> |
|---------------------|----------------|
| 1.                  |                |
| 2.                  |                |
| 3.                  |                |

**B. Client Visits.**

1. Identify clients who would be appropriate targets for inviting to visit one, or more, of our offices and make a presentation about their businesses to our staff:

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2. Identify clients who would be appropriate targets for an accountant to visit the offices of, and make a presentation to, on a timely issue of interest or concern:

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**C. Cross-selling.**

Identify existing clients that have a need for an expanded service. Please list client and service: **(This can also include clients that you plan to review to determine if they need any expanded services.)**

| <u>Client</u> | Description of Action and <u>Outcome Goal</u> |
|---------------|---|
| 1.            |   |
| 2.            |   |
| 3.            |   |



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**D. Prospects and Referrals.**

Identify referral sources who you will regularly entertain by way of lunches, dinners, etc.:

| <u>Referral Source</u> | <u>Activity</u> |
|------------------------|-----------------|
| 1.                     |                 |
| 2.                     |                 |
| 3.                     |                 |

**E. New Business Development.**

Identify target prospects you will seek to develop new business from:

| <u>Target Prospect</u> | <u>Type of Accounting/Consulting Work</u> | <u>Activity</u> |
|------------------------|---|-----------------|
| 1.                     |   |                 |
| 2.                     |   |                 |
| 3.                     |   |                 |
| 4.                     |   |                 |

**III. MENTORING**

**A. Mentoring.**

Identify the types of mentoring you would like: (For example: Are there any clients you would like to meet, or would you like to go to a referral source meeting, etc.?)

| <u>Activity</u> | <u>Mentor</u> |
|-----------------|---------------|
| 1.              |               |
| 2.              |               |
| 3.              |               |
| 4.              |               |