

Business development coaching checklist

Please indicate on the list below those areas on which you would like to focus during sessions with your Julian Midwinter & Associates business development coach.

Opportunity identification

- Finding opportunities
- Recognising opportunities
- Assessing and evaluating opportunities
- Ranking opportunities
- Identifying obstacles

Making initial contact

- Planning the approach
- Setting clear objectives
- Overcoming call reluctance
- Writing persuasive contact letters
- Making the call
- Planning the business development meeting
- Introducing myself
- Introducing my team
- Introducing my firm
- Managing the meeting
- Explaining my capabilities
- Explaining my team's capabilities
- Explaining my firm's capabilities
- Describing the work I do in terms of benefits to my client
- Gaining commitment to proceed to next step

Campaign management

- Effective campaign planning
- Effective campaign execution
- Writing persuasively
- Presenting persuasively
- Negotiating persuasively
- Managing deadlines

Account management

- Planning key account strategies
- Understanding my client's decisionmaking process
- Selecting and building my team
- Effective resource planning
- Setting team objectives
- Getting commitment from my team
- Making meetings effective
- Managing client expectations
- Getting client acceptance of delegation
- Converting opportunities into matters and fees
- Advancing stalled opportunities
- Solving client problems
- Dealing with unhappy clients
- Handling demanding clients
- Overcoming obstacles
- Requesting referrals
- Asking clients for references and testimonials
- Asking clients for personal and team performance feedback
- Assessing client satisfaction
- Following-up on client feedback

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Expanding accounts

- Getting close to clients
- Handling engagement meetings
- Identifying opportunities for growth
- Obtaining invitations to propose or tender
- Planning sales meetings
- Selling your team
- Cross-selling to established clients
- Following-up opportunities
- Writing effective marketing letters
- Using client feedback to grow your accounts
- Leveraging from success

Doing well in difficult times

- Dealing effectively with client concerns
- Overcoming price objections
- Handling billing disputes
- Winning back lost opportunities
- Dealing with angry clients
- Dealing with fear of personal failure

Other business development skills

- Understanding the business development process
- Understanding how clients make decisions
- Presenting my firm's credentials
- Positioning and differentiating my firm
- Prioritising personal marketing efforts
- Winning in the face of direct competition
- Eliminating time-wasters
- Promoting fellow partners and colleagues
- Asking for commitment to proceed

Networking

- Working with key referral sources
- Entertaining with purpose
- Maximising client events
- Networking at industry and professional events

Measuring performance

- Monitoring what is important
- Identifying key personal indicators
- Identifying key team indicators
- Promoting team momentum
- Using measurement to improve service delivery
- Explaining my capabilities
- Assessing client satisfaction

Prices & competition

- Discussing fees
- Handling price negotiations
- Dealing with fee increases
- Discussing competitors
- Coming from behind the competition

Interpersonal skills

- Adapting personal style for improved impact
- Increasing personal influence
- Developing personal confidence
- Using the telephone as an effective marketing tool
- Understanding my audience
- Planning effective questions
- Developing flexible questioning styles
- Probing for unexpressed concerns
- Listening actively
- Using eye contact effectively
- Building trust and rapport
- Establishing credibility
- Building strong personal relationships
- Expressing sincere interest and concern
- Making myself memorable
- Negotiating to enhance client relationships

Others please specify

Name: _____ Title: _____

Firm: _____ Fax: _____

Direct phone: _____ Email: _____

Best time to contact: _____