Networking strategies offer opportunities to create the first personal linkages among providers, referrers, and potential clients. The question is not should I network? Rather it is, how given all the available networking possibilities, can I create relationships with the people who are right for me at this time in my life and my career?

The answer is to create a networking strategy.

The difference between ad hoc networking activities that may or may not pan out and strategically cumulative networking initiatives is a plan. A plan is an important document for many reasons:

- It includes goals that point separate undertakings toward a common end.
- It prioritizes strategies, assigning time and money resources to each one.
- It includes metrics to evaluate the value of specific initiatives.
- It keeps you grounded and focused on where you need to go and why.

Most of the networkers interviewed for this book have a specific goal-based strategy that informs their networking decisions. Examples include the following:

Stacey Cohen, CEO of a marketing communications firm, works with clients in five industries, so she wants to interact with higher-level executives, CEOs, and business owners in those industries.
Roger E. Barton, managing partner of Barton LLP, concentrates his networking in three organizations where he meets potential clients: (1) Primerus, an international association of law firms, (2) the British-American Business Association, and (3) an educational institute he founded that provides programs for in-house counsel.

Martin S. Klein, a trust and estates attorney, is active in two kinds of groups: attorney-dominated groups where he meets lawyers who become referral partners, and general membership groups where he meets other professionals who can be both referrers and resources for his clients.

In this chapter we discuss the process for developing goals and creating an action plan that moves you toward your goals. The plan should have three key components:

- Clearly defined goals
- A SWOT [strengths, weaknesses, opportunities, threats] analysis to identify strategic opportunities and obstacles
- An action plan that
  - establishes guidelines for when, where, and how to expend your time and money;
  - integrates and prioritizes your goals, strategies, and tactics; and
  - creates metrics to gauge the value of specific activities

**Steps in the Planning Process**

Figure 2.1 shows the steps in the planning process. The four-step process includes two research steps followed by two action steps. The two research steps are:

1. Research about yourself, your career/life plans, helpful and inhibiting factors related to your workplace, and your social interaction preferences.
2. A SWOT analysis, which is a four-quadrant summary of your own strengths and weaknesses juxtaposed to the situation in the world outside that presents both opportunities and threats.

The two action steps are:

1. Setting pragmatic, realistic, doable goals that can be tracked and measured.
2. Preparing a marketing action plan that assigns strategies and tactics to each goal.
Creating a Research-Based Action Plan

Figure 2.1 Steps in the Planning Process

<table>
<thead>
<tr>
<th>Your Context</th>
<th>SWOT Analysis</th>
<th>Goal-Setting</th>
<th>Marketing Action Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>personal preferences</td>
<td>YOU: strengths weaknesses</td>
<td>SMART goals specific measurable attainable relevant time-based maximum of 3 goals</td>
<td>two strategies per goal</td>
</tr>
<tr>
<td>work/career plans</td>
<td>OUTSIDE WORLD: opportunities threats</td>
<td></td>
<td>two tactics for each strategy</td>
</tr>
<tr>
<td>assets/ liabilities of firm/company</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>social interaction preferences</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The worksheets found in Appendix 2, pages 185–192, will guide you through the specific content for each step.

Setting the Context
Selecting appropriate goals begins with constructing a context in which to place the goals. This process begins with a self-assessment of your preferred work-life and personal-life choices. These choices create the base upon which you will build your plan.

Research Begins with YOU
GPS keeps us on the right road, but only when we input the correct destination. So, too, with business development and career growth. First, you need to identify a destination. If you don’t know where you are starting from or what your goals are, you are liable to find yourself facing dead ends.

Networking strategies should be closely tied to your career and life goals, where you think you are on the introvert–extrovert continuum, your personal preferences regarding meeting and talking to people, and your ambition and curiosity. The series of worksheets found in Appendix 2, pages 185–192, are designed to help you assess these issues.
Begin by answering the personal questions in Worksheet 2.1 Personal Preferences: Work-Life Balance [Appendix 2, pages 185–186]. The questions relate to the relative importance of work and non-work as parts of your life.

You also need to look at specific aspects of your work environment:

- First, aspects of your present situation
- Then, your future “druthers”

You want to think about what you like to do and what kind of people you like to work for and with. Ask yourself where, when, and how you want your life and your career to intersect. To get started, answer the questions in Worksheet 2.2 Your Work [Appendix 2, page 187] as honestly, realistically, and thoughtfully as you can. The questions refer to specifics about your work including the type of work you do, the kind of clients you work with, what you like and don’t like about work, and what changes you would make if you could.

Now that you have thought about your own work and the clients you work with, the next worksheet, Worksheet 2.3 Assets and Liabilities of the Company/Firm You Work For [Appendix 2, page 188], asks you to review the larger picture of the assets and liabilities of the entity you work for in order to see which aspects may help or hinder attainment of your goals.

The firm or company creates a major part of the context in which you develop your networking strategies. You want to pay attention to the entity’s brand, resources, client base, and competitors.

- The **brand** represents the history, activities, and reputation of the entity you work for. Think Enron versus Goldman Sachs. The higher the brand value, the easier it is for you to use it as a base for your own networking activities.
- **Resources** refer to the physical and cultural support for personal marketing activities. Does your firm value and promote personal marketing initiatives? Does the firm pay for group memberships, conference expenses, firm-sponsored networking activities?
- **Client base** refers to the kind of clients you work with and would like to work with in the future. The characteristics of your best clients will become characteristics of your networking target.
- **Competitors** are those individuals, companies, and firms that rival or outshine the entity you work for.

Brand, resources, client base, and competitors will all impact your own business development efforts. For example:

- If your firm has strong brand awareness and large market share, this can be an advantage for you.
Creating a Research-Based Action Plan

- If your firm’s client base includes many companies or individuals who could use your services if they knew they were available, this can be an advantage for you.
- If another professional in your firm has a strong brand and presence in your practice area, you will need to find a way to differentiate yourself.
- If your firm is struggling for market share, this could make it more difficult to grow your own practice.

Worksheet 2.4 Social Interaction Preferences [Appendix 2, page 189] focuses again on you. This time in terms of your social preferences. Networking is about developing and maintaining close personal relationships, so you need to think about your attitude toward and aptitude for social interaction. Networking activities run the gamut from one-on-one meetings to large events. What kind of group situation do you prefer?

Some people don’t want to “give to get.” Others feel like they have no resources or contacts that would be of interest to other people. You need to assess honestly your willingness to put yourself out to meet other people and help them attain their goals. Use Worksheet 2.4 to consider these sometimes-difficult questions.

Where are you on the introvert–extrovert scale? While anyone can learn to network, introverts tend to use different approaches than extroverts to increase their effectiveness. For example, extroverts may move through parties high fiving and asking basic how are you questions, while introverts may prefer to settle down with one person for an in-depth conversation.

SWOT: Strengths, Weaknesses, Opportunities, and Threats Matrix

Once you have completed Worksheets 2.1 through 2.4 you will have enough basic information to create a one-page summary of the pluses and minuses that will affect attainment of your goals. Use Worksheet 2.5 SWOT Analysis [Appendix 2, page 190] to present all the factors you think may impact movement toward your goals.

Following is a sample of the kinds of questions you need to include in the SWOT. Look back to your answers in the worksheets and then include those ideas in this analysis. When you are finished you should have a comparison of your situation vis-à-vis the context in which you will approach networking. This
analysis will help you determine your networking target, your message for your target, and your available resources.

Worksheet 2.5 SWOT Analysis with Sample Questions

**Strengths***
- What are you good at?
- Why do people hire you?
- How do clients benefit from the work you do for them?
- How are you different from others who practice in the same area?

**Opportunities**
- What trends, legislation, laws, or court decisions are on the horizon that can make your goals more relevant to potential clients?
- Where are the best places to grow your practice?
- Where are the kinds of clients you want to work with?

**Weaknesses**
- What attitudes and habits interfere with your work life?
- What resources will you need that you don’t have now?
- What new subjects will you need to master?
- What new skills will you need to acquire?

**Threats**
- What threats are there in your work environment?
- What threats may emerge in your private life?
- What trends could adversely impact your plans?
- Who are the competitors already in the space you want to occupy?

*NOTE: Strengths and weaknesses refer to you in the context of the questions answered in Worksheets 2.1 through 2.4.
**NOTE: Opportunities and threats deal with phenomena in the external environment.

**Goal Setting**

Once you have completed Worksheets 2.1–2.5, you are ready to draw a big picture, personal preferences canvas on which to paint specific goals and the strategies necessary to achieve them. Saying you want more business is an aspirational goal. A viable goal is realistic, detailed, and definable, such as:

- I want to acquire two corporate clients in the energy industry in need of counsel concerning interstate contracts.
- I want to double the amount of work I do for my two largest clients.
- I want five new clients in the renewable energy sector.
Creating a Research-Based Action Plan

One way to come to grips with specificity is to remember the SMART¹ goal-setting acronym:

- **S** = specific [be precise in your language]
- **M** = measure [be able to quantify or estimate qualitatively]
- **A** = attainable [possible to achieve]
- **R** = relevant [consistent with your goals]
- **T** = time-based [due dates, time line]

Keeping this mnemonic in mind can help you to distinguish “druthers” from actionable initiatives.

Use Worksheet 2.6 Goal Setting [Appendix 2, page 191] to set out one to three specific, measurable, achievable goals to move toward in the next 12 months. A year may sound like a long time, but in practice, it can take that long to develop the close relationships that lead to new business.

To make the path to your goals more realistic, subdivide your major goal into segments that have three- to six-month time frames. Choose only one goal to begin if that makes you more comfortable. If you have more than three goals it is hard to find time to move them all forward.

A few hints:

- If you decide to have monetary goals in addition to a dollar amount, you might want to specify percentages to come from new clients and/or from additional work from current or past clients.
- If you want to add new clients, be specific in terms of the clients’ key characteristics and the nature of the work they want you to do for them.
- If you want current clients to add additional kinds of work, specify the new areas of work and why they would want you to do it for them. You may want to indicate the client(s) and the services.
- If you have work–life balance goals, you may want to identify the time management initiatives that will be required to achieve this balanced life.
- If you have personal goals, such as intellectual or subject matter challenges, you may want to tie those goals to others related to expanding or changing your work focus.

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Putting a Plan Together

Now you have formulated a realistic assessment of your world and your first set of goals. The final step is to write an action plan that adds the strategies and tactics you will use to achieve the goals. The purpose of a plan is

- to think entrepreneurially about growing your practice,
- to provide the nuts and bolts of a strategic marketing plan, and
- to increase your business opportunities by building the process around your goals.

It’s a truism that people hire people they know, like, and trust. Usually those people are similar in important ways to each other. Through strategic networking you can identify those people, locate them, and learn how they prefer to gather information and make choices. Of course, the final step is then to go where they go and meet with them.

In your plan, you will want to lay out your intentions for identifying and connecting with people from different parts of your life. Think about the following people:

- Current clients with the potential to use more services
- Current clients who can introduce you to potential clients
- Referral sources both in and outside your place of business
- End-users who could become clients

Your intentions could include the following strategies:

- Become visible to potential clients
- Become known as an experienced, savvy, successful practitioner in your chosen area
- Increase the quality of your referrer base
- Create a social media presence that reinforces your in-person networking activities
- Become comfortable and accepted in your target market
- Broaden and/or deepen the connections in your network

Use Worksheet 2.7 Marketing Action Plan [Appendix 2, page 192] to create your written plan. Writing it down helps you think in terms of the whole process—where you want to begin and where you want to end. A consultant colleague of mine says that “written plans are also easier to share with others, easier to review and modify as time goes on, easier as gauges of your progress and execution, and easier to hold yourself accountable.”

To begin, carry the goals over from Worksheet 2.6. For each goal you will develop one or two strategies designed to reach the goal.
In the action plan, you will map out a series of strategies and tactics to move toward your goals. Strategies and tactics are complementary, like Dick and Jane, Mutt and Jeff, Abbott and Costello. They work together but serve different functions.

**Strategies** are broader than tactics.

- Strategies identify in broad strokes where you need to go to achieve a goal. They point the way.
- Strategies focus activities and initiatives so that you can accomplish more in less time.
- Strategies turn goals into realities.

**Tactics** are the details, the to-dos that implement strategies. Strategies help you identify target audiences; tactics finds the specific place where those people congregate. For each strategy, you should identify one or two tactics.

- Tactics are specific to-dos that when executed accomplish the strategy or move it forward [See “List of Possible Tactics” Appendix 3, page 209].
- Selecting a specific networking group or trade association conference is a tactic.
- Tactics include plans to attend specific group meetings, make dates with specific individuals, set time lines and due dates, write articles, speak at conferences, and so on.

Select your tactics carefully so that they maximize your ability to interact with people who can help you to grow. You want to limit your goals, strategies, and tactics to fit your resources—time, money, outside assistance. It is better to work on one goal effectively than three goals nominally.

You will also want to coordinate your activities so that the impact on your target audience is cumulative. For example, if you want your target audience to know more about your expertise as a litigator with extensive experience in product liability cases, you could do any or all of the following:

- Identify and join specific groups and organizations where your target audience goes for believable advice and information.
  - Plan how you will become a part of the group’s community. For example, you could join a local chapter committee, volunteer to write an article for their newsletter or blog, or volunteer to host a panel or be a speaker at their annual conference.
- Identify four to six people in the groups you join whom you want to get to know.
  - Make dates with them to have a beer after a meeting or meet on a separate day for coffee.
• Begin to think about people you might introduce them to or information you might send them.
• Identify four to six appropriate referral sources:
  • Other professionals who work with your target audience
  • Contacts who work at your best clients who could introduce you to their contacts at similar firms
  • Colleagues and vendors who also work with your best clients
• Check if LinkedIn has an online group that is the same as the in-person group you plan to join, and if so, join it. Then set aside time each week to check the discussions and contribute to one discussion in a way that showcases your expertise.
• Search for online sites and groups where your target audience goes and join them. Participate in a similar fashion.

Some tips:
• People buy expertise, so when you think of marketing, think of it in terms of specific proficiencies that your niche groups may be interested in using.
• Spend 80 percent of your time building relationships and 20 percent building your reputation.
• Planning ahead and writing the plan are important preconditions for actually following through with the plan specifics.
• Review your plan quarterly and make adjustments to take advantage of opportunities as they occur or to amend or drop unsuccessful initiatives.

Interviewees’ Strategies
Many of the successful networkers I interviewed began their business development networking forays looking for anyone, anywhere. As they built their networks they realized how much time they wasted going to the wrong venues looking for the wrong people. They became more discriminating, cutting down on quantity and looking for higher value connections.
• When David J. Abeshouse, an attorney, first went into solo practice as a litigator he would go to 20 or more networking activities a week, looking anywhere and everywhere for referrers or clients. Often, he was “lookin’
for love in all the wrong places.”2 As he gradually morphed his practice from litigation to mediation and arbitration, including as a neutral arbitrator and mediator, he cut down his activity level. He now participates in fewer groups and looks for the value and quality in the contacts he spends time with.

- David Rosenbaum, a technology consultant, says his strategy has always reflected what is going on in his profession. In the 1980s, no one really knew what to do with computers, so he had to provide information and plant seeds. By 2000, computers had become ubiquitous and his strategy morphed accordingly from teaching about the product to creating available resources for clients. Today, potential clients are once again confused by all the options and he is again in teaching mode, planting seeds.

- James K. Landau, a litigator, concentrates on meeting individuals who are lawyers or who can refer him to lawyers. When he meets them, he articulates the benefits of referring business to him when they are conflicted out of the work or are uncomfortable taking a particular case. For example, in the beginning, he decided to focus his activities around his local bar association. One day, his committee co-chair introduced him to her husband who was conflicted out of a case. The referral became one of his biggest cases.

- Marcia Sloman, a professional organizer who helps people detach from their possessions, initially looked for business “anywhere and everywhere.” Today she focuses on therapist referrers because she found that often one manifestation of their clients’ problems is clutter.

In each of these examples, the networkers’ strategies maximized connections relevant to their goals by concentrating their efforts on the most meaningful associations. Strategic changes reflected their understanding of their practice strengths and their assessment as to the best available opportunities.

Chapter Summary

Creating a marketing action plan allows you to gain control over the growth of your practice and your career and focus on what interests you. You can concentrate your efforts on clearly identified audiences and niches.

Interacting with defined target groups lets you learn their habits, preferences, and jargon. You will be able to learn the nuances and details of their environments. At the same time, they will learn about you and the relevance of your

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expertise to their needs. The result will be opportunities to cultivate meaningful relationships with people you can help to succeed and who, in turn, will want to help you succeed.

We will now turn to some “how” chapters: how to create a contacts base, how to assess in-person and online groups in order to find the most appropriate ones for you, and how to prepare yourself and your materials to make a memorable impression.