Marketing & Business Development Planning Checklist

This checklist is designed for you to use while developing your law firm's annual marketing and business development plan. It supports both firmwide planning and the development of plans for individual practice, industry sector and other groups. Pair this with the CMO2go Marketing Plan Template to simplify your planning process and make your life easier!

1. Set Your Planning Foundation

☐ Confirm the planning period and key deadlines (fiscal year, budget cycle, leadership review dates) ☐ Review the firm's business plan and strategic priorities for the coming year ☐ Review last year's marketing plan, results, and lessons learned

☐ Confirm who owns the plan and who needs to approve it

☐ Schedule planning meetings with firm leadership and practice/industry group leaders

2. Assess Your Current Position

☐ Review performance against last year's marketing and BD goals

☐ Audit current marketing assets (website, content, collateral, brand positioning) ☐ Gather input from partners, practice group leaders, and key business developers ☐ Review the competitive landscape and market/industry trends affecting the firm ☐ Identify strengths, gaps, and opportunities from the past year

3. Define Priorities, Goals & Audiences

☐ Confirm firmwide business goals and translate them into marketing objectives ☐ Prioritize practice, industry, and geographic groups for focused investment ☐ Set specific, measurable goals for each priority area

☐ Define target audiences for each priority (clients, referral sources, prospects, laterals, talent) ☐ Clarify positioning and key messages for each priority area

4. Build the Tactical Plan

☐ Map tactics to each strategic priority (content, digital, PR, events, sponsorships, BD support) ☐ Assign an owner and timeline for each initiative

☐ Identify shared initiatives across practice or industry groups

☐ Cross-reference tactics with the CMO2go Marketing Budget Template to confirm they're affordable

☐ Note dependencies (design, outside vendors, approvals) that could affect timing

5. Establish Measurement & Reporting

☐ Define the KPIs and success metrics for each goal

☐ Decide how and where results will be tracked

☐ Set a reporting cadence (monthly or quarterly) and identify who receives updates ☐ Build in checkpoints to reassess priorities if the market or firm strategy shifts

6. Finalize & Share

☐ Present the draft plan to firm leadership for feedback

☐ Incorporate feedback and finalize the plan
☐ Secure sign-off from leadership and, where relevant, group leaders
☐ Share the finalized plan with the marketing team and stakeholders
☐ Schedule quarterly reviews to track progress against the plan