

Play to Win

Planning a Strong Fourth Quarter for Your Law Practice

Football games are often won or lost in the fourth quarter. You are in the fourth quarter now.

By [Sally J. Schmidt](#) October 29, 2018



Winning isn't imperative, but getting tougher in the fourth quarter is." – Bear Bryant

I love football. High school, college, pro — it doesn't matter. While football teams need a strong performance for the entire 60 minutes, I know that games are often won or lost in the fourth quarter.

You are in the fourth quarter now. Hopefully you've been productive with your business development and marketing activities all year. But, as the calendar winds down, here are some things you can do to finish strong and set yourself up for a win next year.

Preparing for the Year's End

Now is the time to plan your year-end activities and put things in place for the New Year. Here are some examples:

- **Holiday outreach.** If you send holiday cards or gifts, is your list ready? Prepare a list of your top 2018 clients or referral sources by revenue to be sure you are recognizing the most important people. Determine which ones will get handwritten cards thanking them for their relationship — you can even write them out now. Decide who will get a gift. Give some thought to appropriate recognition; you still have time to personalize or customize your approach. (See ["Law Firm Holiday Card Planner."](#))
- **Client budgets.** Most clients are going through their planning and budgeting process now (if they haven't already). Talk to your clients about their key imperatives for 2019 and how you might help. Assist them in determining numbers to plug into their budgets for big matters or anticipated projects.
- **Substantive summaries.** Do you create any annual reviews or yearly summaries? Many lawyers prepare things like the "Top 10 Whistleblower Cases of 2018" or "Trends in White-Collar Matters." If you gather information from the first three quarters now, it will be easy to add to the final analysis. It will also help you get your information out to your audiences in a timely fashion.
- **Lunches, parties or dinners.** If you plan to see good clients or referral sources before the end of the year, start to schedule these get-togethers. Calendars fill up quickly with holiday events and year-end activities so get some commitments now.

- **Client visits.** Most clients are going to be busy in the fourth quarter so you should plan to meet with as many as possible in the early part of 2019. This is an excellent time to get together for a look back at 2018 — what you handled, how it went, what could have been done better — and a look forward at the new year — what is coming down the road and how you fit in.
- **Business plan.** Finally, and very importantly, write your personal business plan for 2019. (See [“Writing Your Annual Business Development Plan.”](#)) If you have time, do it strategically, identifying your goals, objectives, strategies and activities. If you don’t, you can still make your efforts more productive by establishing some objectives for 2019 (e.g., plan three webinars, write 12 blog posts, visit a client once per quarter) and outlining some specific activities for the first quarter (e.g., “Visit XYZ company to introduce my colleague from the New York office”).

I understand that many lawyers are busiest at the end of the year. By starting your activities now, you won’t miss out on fourth-quarter opportunities.