

CLIENT AND BUSINESS DEVELOPMENT AUDIT

All of the audit items below exist in the “perfect world” of business development. Knowing that few firms are perfect, the intent of this exercise is to see where your falls to determine how to move forward with business development in the future.

Please **X** in the most appropriate response for each statement.

	<i>Always</i>	<i>Usually</i>	<i>Sometimes</i>	<i>Seldom</i>	<i>Never</i>
The BD model is clearly defined and communicated (how we do it)					
BD responsibility is clearly defined and communicated (who does it)					
Operationally organized for effective BD (utilization)					
Sales cycle is identified (sales mapping)					
Specific markets are identified with a strategy to pursue					
Market research is conducted on existing and prospective clients to help facilitate BD					
BD intelligence/knowledge is shared					
BD skill gaps are identified					
BD education/coaching is provided					
BD plans for existing clients is in place, including specific touchpoints					
BD plans for prospective clients is in place, including specific touchpoints					
BD and industry best practices/trends are understood					
Professional staff attends client organization events					
Professional staff attends community/professional events to network and gather industry information					
Professional staff is skilled at having deliberate BD conversations with clients and/or prospects					
Professional staff understands the market trends and factors affecting their clients					
Professional staff knows about projects before the request for proposal					
Professional staff has strong relationships with owners to help clients win work					
Debriefs occur when a project is lost (or even won)					
Thought leadership or unique solutions are routinely shared with clients (lunch & learns, white papers, blog post, etc.)					
Comments and/or Thoughts:					