



Pennsylvania

AIA SFxPA

2nd-on-2nd SMALL FIRM FORUM

Monthly Business Development Checklist

A. Relationship Building

- Schedule 3–5 one-on-one coffees or calls with **key contacts** (clients, connectors, past collaborators).
- Attend at least **one industry/networking event** (conference, panel, community meeting, trade show).
- Reconnect with **one dormant client or contact** (email or handwritten note).

B. Visibility & Thought Leadership

- Publish or share **one insight or project update** on LinkedIn or Instagram.
- Submit to **one speaking opportunity, award, or article** (if available).
- Update firm's website or portfolio with **recent work** (even small wins).

C. Opportunity Scouting

- Review **public RFPs/RFQs** and align with firm capabilities (go/no-go decisions).
- Identify **2–3 upcoming projects** via contacts or informal intel (before RFP stage).
- Analyze **competitor moves** or new hires to anticipate market shifts.

D. Client Care

- Send **thank-yous or milestone acknowledgments** (e.g., project anniversary, client promotion).
- Conduct **post-project check-in** with any recently completed work (feedback, testimonials).
- Identify **cross-sell opportunities** with existing clients (other buildings, phases, services).

E. Team Engagement

- Hold a **15-minute team BD huddle**: share who's meeting whom, what's in the pipeline.
- Invite one team member to **shadow a client meeting or event** for BD training.

F. Metrics & Reflection

- Log all new contacts and meetings into a simple tracker or CRM.
- Review wins/losses and identify patterns (proposal success, client feedback).
- Adjust BD focus for next month based on outcomes and capacity.