

• How the WSBA can help with:	
Adopting and implementing technology and marketing Client relationship management	
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LEARNING OBJECTIVE • How the WSBA can help with:	
Adopting and implementing development relationship business technology and marketing management operations	
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Download Forms and Checklists Planning Ahead Handbook (pdf) 496 KB	Business Plan Template (pdf)
Guide to planning for unexpected events.	Template for developing your own business plan.
Client Matter Management Template	Conflicts Check Database (xlsx)
14 KB A template to keep track of active client matters	An example form to help avoid conflicts of interest.

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