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*Preventing “Lawyer Meltdown” and Creating Productive, Profitable and Enjoyable Law Practices*



## How To Succeed With Law Firm Strategy and Planning

*By Allison C. Shields, Esq.*

It's a good idea to revisit the firm's strategy and goals periodically to see whether the firm is meeting expectations and whether the firm is continuing to pursue its mission and purpose. How well is *your* firm executing its strategy?

### Strategy Requires Standards

David Maister, a well-known management consultant to professional services firms, suggests that often law firms fail in the strategic planning process because they lack a set of standards or rules that the firm refuses to compromise on. This is true whether regardless of firm size, because they fear turning business away or alienating 'stars' in the firm by requiring them to follow specific rules.

Rules and standards are important because they provide guidance when there are difficult choices to be made and they help keep the firm on track. Without rules and standards, the firm's strategy has no 'teeth.'

How can the firm (or the solo practitioner) be committed to a particular strategy without demonstrating that commitment by creating standards or rules to allow for that strategy to succeed? Without rules, it's too easy for the strategy to fall by the wayside when real-life decisions need to be made.

### Coaching and Enforcement

In working with my law firm clients on strategy and change, even when rules and standards are put into place, two additional pitfalls arise. The first is the failure of firm leadership to follow these rules and standards themselves, or to enforce them universally throughout the firm. If rules and standards are to mean anything, they must be followed by *everyone* in the firm with no exceptions. After all, if the firm expects others to live up to their obligations, the firm leaders must first live up to theirs, not only in following the standards themselves, but in enforcing them.

But establishing and enforcing the rules is *still* not entirely sufficient. It must be accompanied by coaching and support to enable all members of the firm to succeed in following the established rules and standards. Everyone involved in the strategy initiative must understand not only what the firm would like to accomplish (the specific goal to be reached), but they must also be told what steps must be taken to reach the goal and be given the tools and training necessary to accomplish the tasks required to reach those goals.

The most successful firms will provide this information on an individual basis, so that each person involved understands how it affects *them* and their role in the firm. Follow up and monitoring in the form of individual coaching should also be provided. Rewards and recognition must be built into the firm's framework, with metrics established to measure progress.

### Individual Benchmarks and Monitoring

Setting expectations, establishing benchmarks and monitoring performance must be done on an individual basis as well as a firm or group-wide basis, because individuals will be performing the tasks. Too often, law firm managers stop after informing the whole group of expectations, without addressing individuals. Similarly, progress is

monitored only on an overall basis, and shortfalls are addressed to a group, allowing individuals to conclude that "they must be talking about someone else," which leads to no change in behavior.

Individual coaching and monitoring are also important to obtain the 'buy in' of everyone involved. Although the firm leadership must set the course and establish the firm's direction and desired results, the individuals performing the daily functions required to meet those results will make better progress when they are permitted to set goals based on their own strengths and interests, rather than having the entire process dictated to them.

As with any strategy, there must be adjustments made along the way, not only to the strategy itself, but also to improve performance. The best way to increase participation and improve performance is by monitoring individuals, identifying their wants, needs and interests, and helping them to reach their goals, which will create more loyalty and increase their desire to improve their performance on behalf of the firm - all of which can be done through a coaching or mentoring relationship.

What is your firm committed to be uncompromising about in order to carry out your goals? How can you provide (or receive) appropriate coaching to enable the firm to reach those goals?

### Strategic Planning Success

A successful strategic plan must:

- Set forth the goals and direction for the firm
- Articulate the action steps required to reach the goals
- Identify the interim benchmarks to be reached
- Establish the standards of performance and
- Include individual monitoring and coaching with individual goal-setting

Placing too much emphasis on the ultimate goal can seem too large and overwhelming and leave participants unsure how to proceed. Instead, firms should

focus on the 'next actions' or first steps that must be taken and provide support to help the team achieve the established goals.

### ***About the Author***

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