



## Executable Strategy

The legal profession is well known for its strategic plans that end with drafting, and there is no execution of the plan. This lack of execution can stem from several reasons, but two of the ones that are increasingly present are:

1. The plan runs contrary to the personality traits of most lawyers, and
2. There was not sufficiently broad engagement in the development of the plan.



Stephen Mabey, CPA, CA  
Principal & Managing Director

### Shelf Plans (aka Grand Plans)

Historically, firms have focused on the "grand plan" (which historically occupies a shelf somewhere in the office). They often involve long-term visions and require extensive resources, time, and effort. Grand plans typically entail higher risks and challenges but are more comprehensive and ambitious.

Dr. Larry Richards (LawyerBrain) is one of, if not the leading experts on lawyer personality. In his studies, he has identified several traits that would appear to the layperson to run contrary to the use of grand plans in law firms.

Their high sense of urgency lends itself to "impatience, jump to conclusions, impulsive, sometimes brusque, poor listeners." A very high degree of skepticism in lawyers generally results in skeptical, judgmental, questioning, and self-protective behaviour. These traits, combined with an attitude of not wanting to be told what to do and being hard to manage, create formidable obstacles to the successful implementation of grand plans.

### Small Plans

Small Plans have different goals than Shelf Plans. They focus on involvement, collaboration, engagement, "teachable moments," and more immediate "wins." They address everyday tasks, personal projects, or short-term objectives, contributing to the bigger picture. These plans are often more easily attainable and can provide a sense of immediate accomplishment.

While the list of challenges facing law firms today can be too exhausting to spend time enumerating, there are several core ones that firms are searching for creative ways to address, including:

- **Fear of losing talent** - mainly as a result of no sense of belonging or being part of something
- **Training** - experience training, not book learning
- **Culture** - reduced contact in a remote working venue threatens the institutionalization of a firm's culture

Small Plans tend to involve smaller groups of lawyers but a more significant number of groups, resulting in a broader engagement of the firm's lawyers.

Active participation in a small group of lawyers can expose younger lawyers to "experience training" in various areas, including leadership, handling challenging /difficult conversations, what the firm is about, the business / economic side of the practice of law, and a sense of belonging, to name a few.

There are a variety of "Small Plans" that firms can initiate, including:

- **Enhanced Client Services:** Improving client satisfaction and experience is critical for law firms. They may explore new methods to provide personalized attention, such as expanding client service teams, offering alternative fee arrangements, or utilizing client feedback to enhance their services continuously.
- **Expansion:** The law firm may expand its operations to new locations by opening new offices or acquiring smaller practices. This activity can help broaden their client base and increase their market presence.<
- **Practice Area Diversification:** A law firm might consider expanding or diversifying its practice areas to meet the evolving needs of its clients better. For example, a firm specializing in corporate law might decide to include intellectual property or environmental law in their services.
- **Technology Adoption:** Many law firms embrace technology to streamline processes, improve efficiency, and enhance client services. This adoption can involve investing in legal software, digitizing documentation, using artificial intelligence in research, or implementing client portals for accessible communication.
- **Marketing and Business Development:** A solid marketing strategy is crucial for a law firm's growth. They may invest in online advertising, content marketing, social media, or networking events to attract new clients and retain existing ones.

- **Lateral Hires and Talent Development:** Law firms may prioritize recruiting new talent through lateral hires, bringing in experienced lawyers from other practices. Additionally, they may focus on developing their existing lawyers through mentorship programs, providing training opportunities, and offering advancement tracks.
- **Operational Business Plan:** Operational plans provide a roadmap for day-to-day operations, focusing on activities like production, distribution, marketing, and delivery. They often include sections on operational goals, processes, resource requirements, and timelines.
- **Succession Plan:** Succession plans typically involve assessing and identifying potential successors, providing them with training and development opportunities, and creating a roadmap for transitioning into client leadership roles. This process helps organizations mitigate potential risks associated with fundamental personnel changes and maintain continuity in their operations.

The firm's management needs to provide overall guidance on the selection and execution of these "Small Plans."

Just as partners must be engaged in developing an overall direction that they wish to see the firm move in, the Small Plans should support/augment this framework.

You can benefit from their unique perspectives, expertise, and resources by including your partners in the planning process.

### Executing Small Plans

Here are a few tips you should consider when establishing Small Plans:

- Start with clear communication
- Identify key stakeholders
- Collaborative brainstorming
- Set shared goals and objectives
- Delegate responsibilities
- Communicate with regular updates
- Continuously evaluate and provide feedback

Whichever approach your firm pursues, Small Plans or Grand Plans, the right approach for your firm must align with your values and culture. Anything else will lead to the "D" s:

- Dysfunctional
- Dissatisfaction
- Disengagement
- Dissolution

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### Who is Stephen Mabey?

Stephen Mabey is a CPA, CA, and Applied Strategies, Inc.'s Managing Director. His credentials include the following:

- Fellow of the College of Law Practice Management (one of 19 Canadians);
- Author of *Leading and Managing a Sustainable Law Firm: Tactics and Strategies for a Rapidly Changing Profession*, and *Key Performance Indicators An Introductory Guide* (Amazon);

- Over 25 years in a senior management role with Stewart McKelvey, a 220-lawyer, 5... office Atlantic Canadian law firm;
- Over 14 years providing advice and counsel to small to mid-size law firms on a broad range of issues;
- A panelist and facilitator of the Managing Partner Information Exchange ("MPIE") at the annual Managing Partner Forum Leadership Conference held in Atlanta, Georgia, each May;
- Runs a group mailing list that circulates articles, directly and indirectly, impacting law firms.

Stephen has advised law firms on a wide range of law firm issues, including - strategic action planning, leadership, understudy (succession) planning, business development, capitalization of partnerships, partnership agreements, lawyer & staff engagement, marketing, key performance indicators, competitive intelligence, finance, mergers, practice transitioning, compensation arrangements, organizational structures, and partnership arrangements.

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