

STRATEGIC PLANNING WORKSHEET

OUR MISSION

WHY DO WE DO WHAT WE DO?

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WHAT MAKES US UNIQUE?

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WHEN CLIENTS, PROSPECTS, OR OTHER LAWYERS TALK ABOUT US, WHAT DO WE WANT THEM TO SAY?

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Need more inspiration? <https://osbplf.org/blog/post/vision-and-mission-statements-for-your-law-practice/>

OUR CORE VALUES – THE GUIDING PRINCIPLES OF OUR WORK – HOW WE OPERATE

THINK ABOUT THE BEST EMPLOYEE AT THE FIRM, OR THE BEST EMPLOYEE YOU HAVE EVER HAD. WHAT QUALITIES ABOUT THEM MAKE YOU THINK ABOUT THEM DIFFERENTLY THAN AN AVERAGE EMPLOYEE?

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WHAT WORDS SHOULD DEFINE THE VALUES OF THE FIRM?

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Need Some Inspiration? Read/Watch/Listen Here: (<https://open.buffer.com/creating-values/>)

IDEAL CLIENT

THIS MAY BE DIFFERENT BY PRACTICE AREA, SO THINK ABOUT THE PRACTICE AREAS YOU KNOW BEST. SOME QUESTIONS TO GET YOU THINKING:

DESCRIBE YOUR IDEAL CLIENT. THINK IN TERMS OF AGE, PROFESSION, GENDER, EDUCATION, FAMILY SIZE, HOBBIES OR INTERESTS, AND GENERAL LIFESTYLE.

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WHAT KIND OF CLIENT WOULD BE A LONG-TERM CLIENT OR A REPEAT CLIENT?

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WHAT CHARACTERISTICS, QUALITIES, VALUES DO THESE IDEAL CLIENTS HAVE?

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WHAT ARE YOU HELPING THEM ACCOMPLISH?

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WHAT ARE THEIR ISSUES, CHALLENGES, AND PAIN POINTS?

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WHAT WILL IT BE LIKE WORKING WITH THE IDEAL CLIENT?

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WHO WOULD BE A GOOD REFERRAL SOURCE FOR THESE IDEAL CLIENTS?

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WHERE DO THESE IDEAL CLIENTS 'HANG OUT'?

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WHO IS NOT AN IDEAL CLIENT?

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WHO ARE SOME OF YOUR CURRENT CLIENTS THAT ARE IDEAL CLIENTS? WHY ARE THEY IDEAL?

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Something To Read: (<https://lawyerist.com/marketing/>) or Listen to: (<https://legaltalknetwork.com/podcasts/lawyerist-podcast/2015/04/15-karin-conroys-5-step-basic-law-firm-marketing-plan/>)

ARE THERE ANY CLIENTS THAT WE ARE CURRENTLY WORKING WITH THAT SHOULD NOT BE CLIENTS OF THE FIRM? IF YES, WHO, AND WHAT SHOULD BE OUR PLAN TO DEAL WITH THEM?

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PRACTICE AREAS

WHICH ONES SHOULD WE GROW AND WHY?

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ARE THERE ANY THAT ARE MORE OF A PAIN THAN THEY ARE WORTH? WHY?

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BUSINESS DEVELOPMENT

ALL THE WAYS WE GET NEW BUSINESS...

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ALL THE WAYS WE SHOULD BE GETTING NEW BUSINESS...

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PRICING STRATEGIES

DOES YOUR FIRM HAVE GOALS AS IT RELATES TO CHANGES IN PRICING, MOVING AWAY FROM THE BILLABLE HOUR, VALUE BILLING, ETC.? IF YES, WHAT PRACTICE AREAS WILL YOU TACKLE FIRST?

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REVENUE GOALS

WHEN YOU THINK OF INCREASING REVENUE AT THE FIRM, WHAT ARE 3 THINGS THAT CAN HAVE A SIGNIFICANT IMPACT ON INCREASING REVENUE?

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PARTNER CONTRIBUTIONS

WHAT ARE 3 RESPONSIBILITIES EVERY PARTNER HAS TO THE FIRM WHEN IT COMES TO BUILDING A SUCCESSFUL FIRM?

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PARTNER COMPENSATION

DOES YOUR FIRM HAVE A SUCCESSION PLAN?

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ON A SCALE OF 1-10 (1 BEING NOT PREPARED, AND 10 BEING UBER PREPARED) HOW PREPARED IS YOUR FIRM FOR THE PLANNED OR UNPLANNED EXIT OF ONE OR MORE OF YOUR LAWYERS?

- Client Retention/Management _____
- Managing Referral Sources _____
- Substantive Knowledge _____
- Law Firm Management _____
- Community Involvement _____
- Individual Retirement Planning _____
- Protecting the Firm Financially _____

For more information about Succession Planning, download this eBook: <https://www.nextpathlegal.com/ebook>

TRANSPARENCY

When it comes to information that is shared with others at the firm, do you feel anything should change?

- With the Equity Partners?
- With the Non-Equity Partners?
- With other leaders/managers?
- With the staff?

TECHNOLOGY

If you have any ideas, or an opinion of something the firm should be doing differently as it relates to technology, please share them here:

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A PEEK INTO THE FUTURE...

Fast forward 3 years from now. What are 3 things that are different at the firm, indicating forward progress from where you are today?

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