STRATEGIC PLANNING

WORKSHOP GUIDE

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INTRODUCTION

Welcome to this comprehensive guide on strategic planning for law firm leaders. In creating this resource, my aim is to provide you with a detailed guide to the approach I take to strategic planning, enabling you to embark on this essential journey. This guide offers a methodical approach to strategic planning, equipping you with ideas and insights to lead your law firm through this critical process.

Why This Workbook?

Not every law firm has the resources or capacity to engage a consultant for strategic planning. By developing this guide, my intention is to share my methodology, and empower you to navigate the strategic planning process independently. With clear step-by-step instructions, you will have the necessary tools to guide your firm through this vital endeavor.

The Flexibility of Strategic Planning:

The strategic planning process is not a one-size-fits-all event. It is an opportunity for your law firm to customize and tailor the process to fit its unique needs and circumstances. While this guide provides a structured methodology, it also encourages you to adapt and mold it to suit your firm's specific requirements. You have the freedom to take these ideas and transform them into a strategic planning approach that aligns seamlessly with your firm's culture and goals.

Shifting Mindset:

Beyond the methodical process, my approach to strategic planning seeks to cultivate a new mindset—one that goes beyond viewing the strategic planning process as a singular event. Strategic planning should be embraced as an ongoing mindset—a continuous process of exploring what lies ahead. By encouraging this perspective shift, this guide will help you foster a culture within your firm where strategic thinking becomes ingrained in the fabric of everyday operations.

Wishing you success and growth on your strategic planning endeavors! If I can answer any questions for you, please do not hesitate to reach out!

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1. KICKOFF CALL

Step one is the kickoff call. This call serves as an opportunity to gather all stakeholders, align their perspectives, and set the foundation for a successful planning journey. As the leader of this process, your role is crucial in guiding the conversation and facilitating meaningful discussions. Follow the step-by-step instructions below to conduct a productive and engaging kickoff call.

Step 1: Preparing for the Call

- Familiarize yourself with the strategic planning process, including its goals, key milestones, and desired outcomes.
- Review the list of stakeholders and their roles within the law firm. Ensure all necessary individuals are invited to the call.
- Give some thought to the order you ask your questions. It is typically best to let the leader or the strongest voice in the room to go last.
- Create an agenda for the kickoff call that includes time slots for each stakeholder to share their thoughts and answer the two primary questions.

Step 2: Introduction and Purpose

- Begin the call by welcoming all participants and expressing your gratitude for their presence.
- Clearly articulate the purpose of the kickoff call, emphasizing the importance of collaboration, alignment, and open communication in the strategic planning process.
- Highlight the desired outcomes of the call, which include gaining clarity on stakeholder perspectives and fostering a shared understanding of the firm's strategic direction.

Step 3: Icebreaker Activity (optional)

To set a comfortable and engaging atmosphere, start with a brief icebreaker activity that encourages participants to introduce themselves and share a fun fact or professional achievement.

This activity helps create a positive rapport among the stakeholders and fosters a sense of collaboration.

Step 4: Overview of the Strategic Planning Process

Provide a concise overview of the strategic planning process that will be followed.

- Outline the key milestones, deliverables, and timelines to give stakeholders a clear understanding of the journey ahead.

- Emphasize the importance of their active participation and involvement in shaping the firm's future.

Step 5: Ask 2 Questions

Explain that each stakeholder will have an opportunity to share their thoughts and answer two primary questions.

- Question One: What are the top 2 reasons YOU thought we needed to create a strategic plan?
- Question Two: What does success look like? When we get to the end of this process, what will be true?

Step 7: Wrapping Up the Call

- Summarize the key insights and perspectives shared during the kickoff call.
- Express your appreciation for their active participation and contributions.
- Share next steps and provide stakeholders with an overview of the upcoming milestones and actions they need to take.
- Offer an open-door policy, encouraging stakeholders to reach out with any further questions or concerns they may have.

By following these step-by-step instructions, you can effectively lead the Strategic Planning Kickoff Call and set the stage for a successful strategic planning process.

2. INDIVIDUAL INTERVIEWS

The individual interviews serve as a critical milestone in the strategic planning process for your law firm. These one-on-one conversations provide an opportunity to gather valuable perspectives from participants, as well as additional individuals who can contribute unique insights. It is important to understand each person's perspective and aspirations, identify opportunities and challenges, and gain insights into key issues relevant to the strategic planning process.

Step 1: Selecting Interviewees

- Identify the core participants who will be actively involved in the strategic planning workshop.
- Consider selecting additional interviewees who can provide unique perspectives, such as newer team members, young attorneys with leadership potential, and long-term employees who possess institutional knowledge.
- Aim for a diverse range of interviewees to capture a broad spectrum of experiences, ideas, and viewpoints.

Step 2: Scheduling Interviews

- Contact each individual interviewee to schedule a 45-minute to 1-hour interview at a mutually convenient time.
- Provide a brief overview of the interview's purpose, emphasizing the importance of their input and assuring confidentiality and open dialogue during the session.
- Share any pre-interview materials, if applicable, to help interviewees prepare and set expectations.

Step 3: Conducting the Interviews

- Begin each interview by expressing gratitude for the interviewee's participation and emphasizing the importance of their insights.
- Create a comfortable and open atmosphere that encourages candid and honest responses. Remind interviewees that their perspectives are crucial in shaping the firm's future.
- Use open-ended questions to explore various aspects, such as:
    a. Their hopes and dreams for the firm's future.
    b. Opportunities they see for the firm's growth and development.
    c. Challenges or obstacles they believe need to be addressed.
    d. Issues or concerns they consider significant for the strategic planning process.
    e. Suggestions for improving the firm's operations, culture, or client service.

- Actively listen and take detailed notes throughout the interview. Seek clarification if needed, and encourage interviewees to elaborate on their responses.
- Maintain a non-judgmental and supportive stance, allowing interviewees to freely express their thoughts and ideas without fear of repercussion.

Step 4: Wrapping Up the Interviews

- Thank each interviewee for their time, insights, and willingness to contribute to the strategic planning process.
- Reiterate the confidentiality of the interviews and assure interviewees that their perspectives will be taken into account during the planning process.
- Offer an opportunity for follow-up questions or additional input, should they have anything else to share.
- Share a brief overview of the next steps in the strategic planning process, including the upcoming workshop or group sessions.

Step 5: Analysis and Integration

- Review the notes and insights gathered from the interviews, identifying common themes, recurring ideas, and areas of consensus or divergence.
- Integrate the interview findings into the strategic planning process, incorporating relevant perspectives and ideas into the workshop agenda and discussions.
- Look for connections and overlaps between interviewee perspectives and the overall goals and objectives of the law firm.

By following these step-by-step guidelines, you can conduct meaningful and productive individual interviews as part of the strategic planning process.

3. FIRM WIDE SURVEY

The firm-wide employee engagement survey is a significant milestone in the strategic planning process for your law firm. This survey aims to assess the current state of employee engagement and gather valuable insights from the entire team regarding what is working well and areas that may require attention. By involving the entire firm, you can foster a sense of inclusivity and gather diverse perspectives. If you are a Microsoft 365 user, you can use Microsoft Forms to create the survey. Below are some sample questions you can consider:

Note: Feel free to customize and adapt these questions to best fit your law firm's unique context and requirements.

Overall Engagement:

- On a scale of 1 to 5, how engaged do you feel in your work at the firm?
- What aspects of your work or the firm contribute most to your engagement?
- Are there any specific factors or areas that may hinder your engagement?

Communication and Transparency:

- How satisfied are you with the communication channels within the firm?
- Do you feel well-informed about the firm's goals, strategies, and updates?
- Are there any suggestions for improving communication or increasing transparency?

Leadership and Management:

- Rate the effectiveness of firm leadership in supporting employee growth and development.
- Are there opportunities for leaders to provide more guidance, support, or recognition?
- Do you feel empowered to contribute your ideas and suggestions to the firm's decision-making processes?

Work Environment:

- How would you describe the firm's work culture and its impact on your overall satisfaction?
- Are there any specific workplace initiatives or policies that positively impact your well-being?
- Is there anything the firm could do to enhance the work environment?

Collaboration and Teamwork:

- How well does the firm foster collaboration and teamwork among employees?
- Are there any challenges or barriers that hinder effective collaboration?

- Do you have any suggestions for improving cross-departmental or inter-team collaboration?

Professional Development and Training:

- How satisfied are you with the opportunities for professional growth and development?
- Are there any specific skills or areas in which you would like to receive additional training or support?
- Do you feel the firm invests in your professional advancement?

Work-Life Balance:

- How well does the firm support and promote work-life balance for its employees?
- Are there any specific initiatives or policies that contribute to a healthy work-life balance?
- Do you have any suggestions for further enhancing work-life balance at the firm?

Feedback and Recognition:

- How frequently do you receive feedback and recognition for your work at the firm?
- Are you satisfied with the feedback mechanisms and recognition practices currently in place?
- Do you have any suggestions for improving feedback and recognition processes?

Diversity and Inclusion:

- Do you feel that the firm values and promotes diversity and inclusion?
- Are there any suggestions for enhancing diversity and fostering an inclusive work environment?
- Have you personally experienced any instances that may require attention in terms of diversity and inclusion?

Suggestions and Additional Feedback:

- Do you have any additional suggestions, ideas, or feedback that you would like to share with the firm's leadership?
- Is there anything else you believe is crucial for the firm to consider during the strategic planning process?

By incorporating these sample questions into your firm-wide employee engagement survey, you can gather valuable insights and perspectives from the entire team. Remember to ensure anonymity and confidentiality to encourage honest responses. Analyze the survey results carefully to identify areas of strength and improvement and use these findings to inform the subsequent steps of the strategic planning process.

4. CREATING THE ISSUES LIST

The deep dive analysis of the interview and survey results is a crucial milestone in the strategic planning process for your law firm. The issues list will serve as a foundation for the strategic planning workshop and beyond, capturing the identified challenges, opportunities, and areas for improvement. It is essential that the person leading the strategic planning process maintains a neutral and objective perspective throughout this analysis phase. The leader should report the issues as they were described by the stakeholders, without personal bias, omissions, or attempts to alter the issues to fit their own preconceptions. This list will be dynamic, allowing for the inclusion of future issues as they arise.

Step 1: Reviewing Interview and Survey Data

- Gather all the interview notes, survey responses, and relevant data in one place for easy reference.
- Carefully review each interview and survey response, ensuring a comprehensive understanding of the insights and perspectives shared.
- Look for common themes, recurring issues, and notable outliers that emerge from the data.

Step 2: Identifying Key Issues

- Begin by organizing the identified insights into categories or themes that reflect the core areas of concern or focus.
- Create a working list of potential issues based on the commonalities and recurring topics observed.
- Prioritize the issues based on their potential impact, urgency, and alignment with the firm's goals and strategic objectives.
- Consider the broader context of the firm's internal and external environments while assessing the significance of each issue.
- Use clear and concise language to describe each issue, focusing on the essence of the challenge or opportunity.

Step 4: Creating a Dynamic Issues List

- Establish a format or template for the issues list that allows for ongoing updates and additions as new issues arise.
- Include a brief description of each issue, capturing its essence and potential impact.
- Assign unique identifiers or codes to each issue for ease of reference and tracking.

Step 5: Finalizing the Initial Draft

- Review the refined issues list for coherence, clarity, and alignment with the firm's strategic planning goals.
- Share the initial draft with key stakeholders or a small working group for feedback and input.
- Incorporate any necessary revisions or additions based on the feedback received.
- Ensure that the final draft of the issues list represents a comprehensive and well-organized collection of challenges, opportunities, and areas for improvement.

By following these step-by-step instructions, you can conduct a thorough analysis of the interview and survey results, resulting in an initial draft of the issues list. This bears repeating – it is a primary reason why internally led strategic planning processes fail. It is essential that the person leading the strategic planning process maintains a neutral and objective perspective throughout this analysis phase. The leader should report the issues as they were described by the stakeholders, without personal bias, omissions, or attempts to alter the issues to fit their own preconceptions.

Remember, the goal is to create an inclusive and comprehensive issues list that accurately represents the challenges, opportunities, and areas for improvement within the firm. By doing so, the strategic planning workshop can address the real issues at hand and develop effective strategies to propel the firm forward.

5. PREPARING FOR THE WORKSHOP

Preparing for the strategic planning workshop is a critical milestone in the overall process. The workshop provides an opportunity for participants to collaborate, build trust, and collectively explore the firm's opportunities, challenges, and potential solutions. I always recommend a 1.5-day workshop, with the first day focused on building connections and understanding, followed by a shorter second day for reflection and decision-making. Below are step-by-step instructions to help the workshop leader prepare for a successful event.

Step 1: Workshop Agenda and Flow

- Develop a detailed agenda for the 1.5-day workshop, ensuring a balanced mix of activities, discussions, and group exercises. (Sample Agenda Below)
- Meet with the stakeholders to review your proposed agenda.
- Allocate sufficient time for trust-building activities, understanding opportunities and challenges, and exploring potential solutions.
- Plan for an early finish on the second day to allow participants time to process and reflect.
- Read 5 Dysfunctions of a Team – it will be really helpful when it comes to having hard conversations where trust is required for healthy conflict.

Step 2: Logistics and Supplies

- Whenever possible, do not have the workshop at the office. Common distractions can disrupt the whole day.
- Ensure that the workshop venue provides a comfortable and conducive environment for discussions and activities.
- Arrange for ample seating, consider a U-Layout for the room, and be sure to secure the necessary audiovisual equipment.
- Arrange for refreshments, snacks, and drinks throughout the workshop to keep participants energized and engaged.
- Check the availability of necessary supplies such as flip charts, markers, sticky notes, and other stationery items. I order the following:
    a. Pens
    b. Notepads (if you want people to have them)
    c. Large Post Its
    d. Fat Sharpie Markers
    e. A package of small post its
    f. Dots

Sample Agenda:

Day 1

8:30 AM	Kick Off; Introductions; Goals for the Retreat
9:15 AM	Trust, Conflict & Relationship Building
10:00 AM	Review of Survey Results
10:30 AM	Break
10:45 AM	Firm Strengths
11:00 AM	The Issues List
12:00 PM	Lunch
1:00 PM	Specific Topic
2:00 PM	Specific Topic
3:15 PM	Break
3:30 PM	Issue List Review/Recap
3:30 PM	Issue 1 – Identify – Discuss - Plan
5:00 PM	Conclusion Meeting Day 1
5:15 PM	Dinner

Saturday

8:30 AM	Kick Off Meeting Day 2, Recap Day 1
9:00 AM	Accountability & Action
9:30 AM	Issue 2 – Identify – Discuss - Plan
10:30 AM	Break
10:45 AM	Meetings, Communication, Decision Making, Problem Solving
11:30 AM	Issue 3 – Identify – Discuss - Plan
12:30 PM	Lunch
1:30 PM	Preparing the Firm for the Future
2:00 PM	Task List, Takeaways, Next Steps & Wrap Up

Conclusion:

Preparation is key – and making sure you doing everything you can to create an environment where people are comfortable talking about challenging things makes a difference

6. AGENDA DEEP DIVE

All the work you have done so far comes together in the 2 days that you spend with the stakeholders. Your agenda does not have to look exactly like mine – I change it up for every firm depending on their issues and what I think we should cover. Let's take a look at the sample agenda.

Kickoff, Intros & Goals: I would suggest you kick off the first day with an icebreaker question. You won't need introductions because you will know everyone in the room. It is important to have some kind of a segue exercise, to get people feeling comfortable with sharing and working together. My go to exercise is "What is your favorite brand, and WHY" You should always go first. It gives everyone time to think about what their favorite brand is. When I answer that question, here is what I say:

> "My favorite brand is Orange Theory Fitness. It's a boutique fitness studio that is known for its one-hour workouts where you focus on cardio and strength exercises. But it's so much more than that. I have been a member of OTF, but mostly a member of the community that OTF has built for many years. Some of my best friends as an adult have come from OTF. I can work out at an OTF anywhere in the country and I know exactly what I'm going to get, and i know I'm going to be welcomed into their community. I have gone with family, with old and new friends, and I have introduced people from all around the country to the concept. Almost everyone has experienced the same thing. It's a gym, but it is also a place where you can build relationships and push yourself to achieve great things."

Go around the room and have everyone do the same thing. When everyone has answered, ask if they learned new things about each other. It is common for people to answer with Costco, Apple, Patagonia, Publix (or your best local grocery store), Target, Amazon, etc.

Introduce Ground Rules: It is important that you set the stage for what is expected for the 2 days. Here are some sample ground rules:

- It's an ALL IN kind of day
- Be Engaged – Technology Free Zone
- No Side Conversations
- One Person Talks at a Time
- Keep an Open Mind – Challenge Your Own Beliefs
- If You Think It, Say It - Make Sure There Is Nothing Left Unsaid – and no consequences

In the kickoff meeting, you asked everyone what success looked like. This is when I revisit that question. We go around the room again, and ask that same question. But this time, the question is 'what does success look like for these 2 days' I write the answers on one of those white post-its as people are answering the question. It gives us something to go back to at the end of day two to see if we accomplished the goals that were set out.

Trust, Conflict, Relationship Building: During this session, I talk about the importance of trust and conflict. The book, 5 Dysfunctions of a Team, is what I use for reference material. You should read that book before the event so you can speak to the importance of candid, respectful communication during the 2 days you all will spend together.

If you uncovered any trust issues (it is perfectly normal…) this is a good time to talk about the importance of laying all the cards out on the table.

Survey Results: You should summarize the survey results. Microsoft Forms has a easy to use summarization tool. You will need to dig further into the written responses to summarize those. I make the survey anonymous, and I never disclose who said what. I always stress that the WHO does not matter as much as the WHAT.

Firm Strengths: This is an opportunity to list out all the strengths of the firm on a large post-it for everyone to see. I typically give everyone a few minutes to make a list of all the strengths of the firm, and then go around the room and make a strong list. It is a great way to get people focused all the good things before you start tackling the challenges/issues.

The Issues List: This is where the fun begins. It is your opportunity to introduce the Issues List to the whole group, and get input from everyone on the issues. We use an exercise called keep, kill, combine to finalize the list. Read off the issues, one at a time. First, ask if the issue is worded correctly. 'Keep' means that it is an issue. 'Kill' means that everyone agrees that it is not an issue, and should not be on the list. Combine means that the issue should be combined with another issue.

Topical Sessions: I typically block out 4-5 times for the firm to deal with any business issues they want to deal with, or sometimes there is an outside speaker talking about a relevant topic, or maybe you want to present on something to help people better communicate, etc. You should think about ways to break up the time so you are not only talking about issues the entire 1.5 days.

Strategic Objectives: In my process, Strategic Objectives are the way we execute on strategic plans. It is a bit of a shift from the traditional model of strategic plans because our goal for our time together is to leave the session with the top 2-4 strategic objectives that need to be tackled with a 'who will do what by when' plan. The purpose of the issues list is for it to be a document that is the single source of truth for all issues that need to be tackled by the firm. When a new issue comes up, instead of feeling like you need to drop everything and solve it, you can simply add it to the issues list.

The issues list should be reviewed at each Executive Committee meeting to ensure that nothing on the list has crept up to URGENT status. The goal would be to come up with a plan for your top objectives, and once those are resolved, that you would take on the next most pressing one. That way, the firm is always working on strategic objectives, the list is always getting updated, and the need for a 2 day strategic planning workshop becomes less necessary.

We would still encourage you to meet regularly, but those meetings can be professional development focused, or you can spend some of the time at a meeting deep diving into a strategic issue that you want to crowdsource/brainstorm, but the updated issues list is your constant reminder of the things you want to work on.

Diving Into Issues: The Issues List comes from Traction the Entrepreneurial Operating System. You can read more about how to handle an issues list here. We use the acronym IDS to discuss how we resolve issues – Identify, Discuss, Resolve.

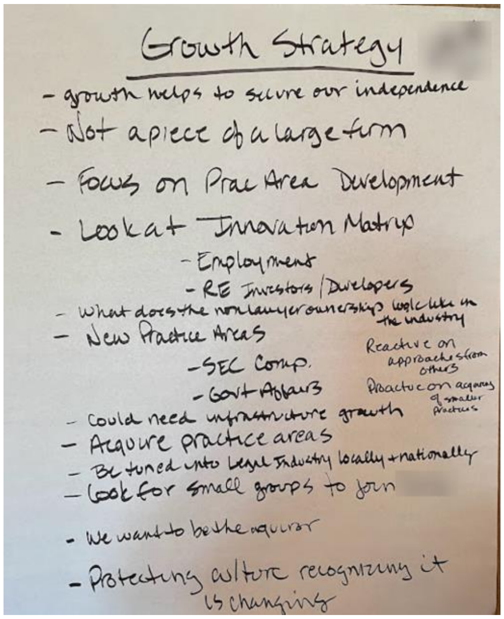
By now, all your issues are up on one or more big white post-its in the room, and you have numbered them for easy reference. Here are some ideas on how to run the session:

1. Give everyone 3 red dots (from the supplies list earlier in this document)
2. Have everyone get up and place dots next to the 3 things they think are most pressing to tackle. No rules here…if someone wants to use their 3 dots on one thing, they can go ahead and do that.
3. Once everyone has voted, there should be a handful of clear winners. Tally the votes, and then recap what got the top votes.
4. Choose the one that got the most for your first IDS session.

Here is an example of what an IDS List looked like after voting:

Running the IDS Session: If you are feeling like you want to sharpen your facilitation skills, there are many free resources to do that on the internet. Here is a book that you can read that will help. This might also be a good time to remind people about the ground rules, especially the no interrupting, and not side conversations.

1. Begin by reading the issue and asking the question – is this the root cause of the issue or a symptom of another issue. Sometimes, as you start to talk through an issue, you find that it is closely related to another thing on your list. For the purpose of walking through the process, let's pretend your issue is "We need to better define what we expect from our Lawyers"
2. I would start by leading a discussion around what we expect. It is not just about billable hours, or about origination. We expect them to engage in being mentors or being mentees. We expect them to be involved in the community. We expect them to develop referral sources, and the list goes on. It is also not the same for every lawyer. What we expect from an Equity Partner may not be the same as what we expect from an associate. Use those white post-its to capture everything that is said. And then, you can decide how you want to go down the Discuss road. Some options:
    a. Individual work – you might ask everyone to take 15 minutes and write down how they feel about lawyer expectations, and then bring the group together to share and capture what they came up with.
    b. You may break the group up into small groups and have them brainstorm together. (pick people that do not always work together – I have someone from the firm help design the groups before we get there, and I have that person pass out the colored post-its to designate their group. Then I could say 'If you got a green post-it when you came in, you are going to go into the room next door. If you got a yellow post-it, you are going to go in the hallway, etc.') For something like this, you might want to do something like 'each group is going to do something different. Group 1 is going to describe in detail the PERFECT associate. Group 2 is going to describe in detail the PERFECT Equity Partner.
    c. You may decide to stay in one group. There are lots of different ways to facilitate that, but one of my favorites is to put a few big post-its on the wall with titles at the top: Financial, Community, Business Development, etc. Then, have everyone use small post-its to write down expectations – 1 per post-it, and then go stick them on the big post it on the wall.
3. However, you decide to run the Discuss session, just make sure you are capturing as much info as possible. Here is an example of what we captured for a firm that discussed ideas around creating a Growth Strategy.



4. Our goal is not necessarily to SOLVE the issue in this meeting. We need to at least flesh it out, and understand where everyone is coming from, where people think the issues are, and how everyone is thinking about the issue. (see Growth Strategy example above) In some cases, you can solve something. But most of the time, you end up with someone who wants to take on the responsibility of leading the efforts to solve the strategic objective. I like to call the group a task force, or an issue team. You pick the leader, and the leader picks who else they want on their task force. IMPORTANT: I would limit it to 4-5 people at the most, and the people they choose do not need to be in the room with you. This is a great opportunity to get others involved in helping the firm solve strategic issue.
5. Once you feel like you have gotten as far as you can get, recap what you all discussed, get your volunteer for leading the task force, and write it down on a new post-it called Tasks. Every time during the session that someone says they will take care of something, put it on the task list. It will be the last thing we recap at the very end of the session.

You are going to want to repeat that process until you feel like you have taken the right number of strategic objectives. Typically, I do not let a firm have more than 2-4 objectives, because it can be overwhelming – and there is often a tendency to 'fix' all the things.

7. WRAPPING UP THE WORKSHOP

Of course, the end of the workshop is just the beginning. It is important that you leave time at the end of the workshop to recap everything that was discussed. I make sure that I keep a large post-it, and sometimes it ends up being more than one, with tasks that people committed to and the names of the strategic objectives with the person that has decided to take responsibility for getting it done. I always stress when we're talking about who is taking responsibility for the strategic objective that they don't need to be the one who does all of the work, that they should recruit a few people to help them accomplish what is set out in the strategic objective. At the end of this document is a form that I use to get people started on thinking about how to plan out accomplishing the tasks that make up the strategic objective.

Inevitably, during the workshop, topics come up that you will want to take the opportunity to do some brainstorming on. Even if it falls outside of a strategic objective, don't be afraid to take 30 minutes to brainstorm an idea. For example, in one strategic planning session that I did, the people in the room really wanted to talk about new ways to approach business development. So, I split them up into three groups, and I gave them 30 minutes to put together the ideal business development plan for the firm. I encouraged them to include details on specific tasks and other things that would make the plan successful. When they all came back in the room, I had them appoint someone from each group to present the business development plan to the whole group. It was incredibly impactful, and was the start of them taking the three different plans, and putting them together into a business development plan that they took to their marketing team. Ideas get shared, they experience working ON the business collaboratively, and the activities build trust.

During your recap, make sure you use the words ‘who will do what by when’ over and over again. It's not enough to just assign tasks and next steps on strategic objectives to people. It's really important that you dig in on deadlines. For tasks, I ask the person who has taken on the task when they think they can accomplish the task by. For strategic objectives, I always make the first task that the leader needs to set the first meeting with the group that they're choosing to be part of the task force.

Depending on the meeting cadence of your firm, you're going to want to set up follow up calls to make sure that tasks are getting completed, and that the task forces are meeting. Depending on your role, you may want to be involved in some or all of the strategic objectives. I typically recommend that you scheduled the first call 30 days post meeting, and then at least the next two meetings are scheduled at 60 days and 90 days after the workshop. From there, you can decide what the right meeting cadence is.

When a strategic objective is completed, it's the perfect time to talk to the leader about taking on the next strategic objective. It doesn't necessarily have to be the same person, but brainstorming who might be the best fit for whatever you feel like is next on the list keeps the momentum going.

From there, it's just a lather, rinse, repeat. Anytime a new issue comes up that is bigger than something that one person can handle; it goes on the issues list. In every executive committee or management committee meeting the issue list is reviewed, and someone takes the time to explain the new things that have been added. We use the issues list as a tool, or a parking lot, to make sure that things don't get lost in the shuffle.

I hope this has been helpful to you. It's really a plan that doesn't have an end, but it's also a plan that lets you shift as you need to and prioritize based on what's happening in the here and now versus what happened at a strategic planning meeting that happened in the past.

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OBJECTIVE NAME: ______________________

OWNER: ______________________

DESCRIPTION

WHY?

TEAM

TASKS

WHAT	WHO	DUE

MEASURABLES

SUCCESS LOOKS LIKE:

OBJECTIVE NAME: ______________________ **OWNER:** ______________________

TASKS

WHAT	WHO	DUE

NOTES: