

Your 6 Step Plan to Get Ahead of the Pandemic

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So many events just in the last week remind us this thing isn't over yet.

The next normal is here. And the next next normal will arrive soon enough. The pandemic can change things in the blink of an eye, and volatility is part of it all. This begs this question — how do you get ahead of it without taking your eye off the ball? My friend and great thinker [Patrick J. McKenna](#) and I discussed this in detail and developed the following plan to get ahead:

IT'S TIME — START NOW

Initiate a task force, unlike ones you have had before. Include one member of top management. Then add experienced partners, income partners, rising stars, counsel, staff, and a few associates. Each group brings its own perspective and bias. You will benefit greatly from a spectrum of experience, vantage points, and generational views.

Starting with the clean sheet of paper. The goal is to gain perspective, unbiased by current strategies and resource constraints. More specifically, charge the task force with collecting:

1. Explore Firm Thinking:

Every single attorney, administrative professional, and support person has an insight. Ask for it. You will be surprised by who has compelling ideas. We recommend the following queries and topics to start things out:

- Ask all about what opportunities they see across the firm and with clients
 - Are any of the new assignments or client questions camouflaging brand new or unexpected client need?
- What they would do differently in their role

- How to boost productivity
 - Are there any new checklist, templates, processes, or work habits the firm can develop?
 - Does the firm have unproductive ‘zombie’ projects we should be killing off?
- Opportunities in the client base you think are unseen
 - What unusual new kinds of client matters have you been working on?
- Other insights they want to share
 - Is there anything that you have observed going on externally that could impact us positively/negatively?

You will find answers worth their weight in gold — offering deep rich insight so valuable it makes the entire effort worth it. And, keep in mind, identifying and deciding what to STOP can be a key aspect of your moving forward.

You can do this through an online survey and no more than 5 questions. The richness of your discussions about these topics will bring equally robust value.

2. Investigate Your Client’s Thinking

Assign at least 2 individuals to act as client advocates. Your CMO and BTI Client Service All-Stars are excellent candidates for these positions. Their sole job is to bring the client’s perspective. You can’t get ahead of the pandemic without getting ahead of clients. The driving client issues to explore include:

- What will clients do in terms of:
 - Disruptions impacting each client’s industry, financial or otherwise
 - Their biggest challenges right now
 - Defining their strategy for moving ahead
 - What they hope to achieve by this time next year
 - Using outside counsel
 - Reporting progress to clients
 - Spending on outside counsel and how they are looking for firms to deliver more value moving forward
 - The new matters coming in the door
 - Giving work to your firm
- What are the implications of all the new matters clients are about to face?
 - When do clients want to see us again — in person
 - How often do they want to hear from the partners (hint: it’s a lot more than you think)

- What personal issues may be creating work/life conflicts for clients
- Define the highest and best strategies to help clients
- How to improve client outreach and business development on a systematic basis, right now

3. Adopt New Planning Horizons

No one knows how long the pandemic and WFH will last. Last March, most attorneys believed they would be back to the office in September. Now firms are talking about Q1 2021, at the very earliest. You can't fix a date but you can plan for multiple time horizons including:

- 1 and 2 quarters
- 1 year
- 2 years

Crossing time frames enables you to spot unnoticed but influential trends, as well as opportunities. You can see themes having legs and themes likely to disappear. All of which help the firm's leadership to stay on top of escalating issues and the decisions you may need to make, but haven't surfaced just yet.

4. Keep Checking the Pulse

Monitor evolving trends, build detailed scenarios, track the leading indicators, be ready with an appropriate plan of action — and update your plan.

- What important trends can we spot, track, and act on, ahead of everybody else?
 - Changes in the nature of client requests
 - New and different client concerns and requests
 - Openings and closings in all sectors of the economy
 - Any new potential outbreaks or slowdowns in the spread
- Are there surprises likely to truly hurt (or help) us?
- What emerging or existing technologies might be able to change the game?
- Is there an unthinkable scenario worth thinking about?
- What if things get better?
- What will work and client relationships look like if WFH is still dominant in Q4 2021?

5. Make Meetings Short

This is too important to have long meetings. Set aggressive meeting time limits and focus your energy. Your goal is to focus on scenarios and actions. We recommend 45-minute meeting sessions once a week.

6. Make Your Observations Even Shorter

Your short and pointed observations, thoughts, and recommendations have a substantially larger impact than long paragraphs and reports. More people read short answers and are more likely to absorb your thoughts.

Well run organizations plan for the unknown. They know they can't predict the unknown or when it will happen, but they can deliver frameworks and hone their planning techniques. We recommend you do as well if you haven't already. It's the best chance to get ahead of what's next.

Be safe. Be well. Be cautious. Stay future-focused.

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