

Overcoming The Hurdles To Executing Your Strategic Plan

by Patrick J. McKenna

Whenever I think about the effort that is required to go into implementing your firm's strategic plan, I'm reminded of a particular business book title that grabbed my attention when I first saw it . . . Hope Is Not A Strategy! To effectively transform your best intentions into best practices, there are several common hurdles that you need to overcome. Thinking through the following will help you make the leap.

1. Move seamlessly from strategizing to implementing.

This is, from my experience, the most significant hurdle. Planning is not doing. Unfortunately, some partners believe that implementing the strategy and "getting their hands dirty" is beneath them. They act as if implementation is something best left to the non-legal professionals in the firm. This view holds that one group does the innovative work ("the strategizing"), and then hands the ball off to lower levels. If things go awry, the problem is placed squarely at the feet of the "doers," who somehow couldn't implement a "perfectly sound" plan.

Strategy and execution should be mutually dependent and cyclical in nature – the results of developing your strategic plan then drive your implementation efforts, which then requires that you think through the strategic implications. This is why execution needs the active engagement of those very same partners that came together to work on developing your strategy in the first place. In other words, it should be absolutely mandatory, when you first begin your strategic planning, to have those who agree to serve on your Strategic Planning Committee understand that they will also be required to serve when your Planning Committee transforms into your Implementation Committee. I have discovered repeatedly, that if the partners who formulated the strategy have no responsibility for executing the strategy, it threatens knowledge transfer, commitment to sought-after outcomes, and the entire implementation process.

2. Have a single point of ownership.

You need to make sure that you clarify specific accountabilities for each strategy and initiative. Each and every member of your Implementation Committee (formerly your Strategic Planning Committee) needs to voluntarily take ownership for being the liaison on some action element and take responsibility for ensuring that they pull together the right partners and people throughout the firm to execute that task. This doesn't necessarily mean that they have to roll-up-their-sleeves and do it (that can be their choice), but it does mean that they are accountable for seeing that it gets done.

3. Do away with "should"

For many firms, a pervasive problem in executing strategy is the existence of ambiguous wording, measurements and tracking mechanisms. Whenever I review some firm's prior strategic plan, I am always taken back by reading goal statements like: "We intend to clearly distinguish ourselves and rise above the pack." Or, how about this for a meaningful strategy statement: "We should create a highly visible positive image in the markets in

which we are determined to be a first choice” or “We should systematize cross-selling of practice areas by facilitating identification of client opportunities.” All of these are perhaps very noble in principle, but without any hint of HOW it’s going to get done.

Without clarity, strategic execution becomes directionless work. Morale and support quickly erode. Alternatively, with clarity, you can create tasks and routines that keep incremental actions moving forward with holistic purpose and accountability.

4. Involve as many of your partners as possible.

Effective implementation involves many hands. Implementation always involves more people than the initial planning did, so communication throughout the firm or across different practice groups becomes an important ingredient. And linking strategic objectives with the day-to-day objectives at different offices and practice groups can become a demanding task. The complexity of execution increases as more people are involved – but that involvement is exactly what is needed for you to achieve any sense of alignment and success.

5. Think through the sequencing of your action plans.

Sometimes you need to focus your execution efforts by thinking about the timing and pacing. When might it be best to move forward on implementing certain elements? Are you going too fast? Are the action plans you want to move forward in the correct sequence? Think about how you might eat a good gourmet meal. Dessert doesn’t come first; in fact, the same dishes served in the wrong order, will disrupt your entire dining experience. To make your strategy work, you have to observe the right sequence of actions, the right timing and the right pacing.”

6. Meet on a regular monthly basis.

Implementation requires enormous time. Overall, successfully executing a plan takes even more time than the hours and weeks invested in developing the plan. It can be extraordinarily taxing to the billable-time expectations and client obligations of the partners and others involved. It takes stamina to stay the course—but if you can prepare for what lies ahead, you might just reach your goal.

Execution isn’t a short burst of activity on a quarterly basis; it is a continuous and ongoing exercise. Execution requires persistence in taking small incremental steps; it can’t easily be delegated. The challenge for the members of your implementation committee will be balancing the urgency of day-to-day client obligations and activities, versus the importance of working on the future. There is an old joke that goes, if you give a lawyer a project to work on and ask that they report to the group by this Friday, they will definitely start working on their project sometime of Thursday. Taking that behavior into account, it makes no sense to do anything but meet as an implementation group on a regular monthly basis with short turnaround times.

7. Get help when specialist expertise is required

While some firm may get their strategic planning right, they can then struggle with how to specifically transform some element of their plan into executable activities. For example, having a strategy that calls for developing Client Teams to provide enhanced value and

service to a select group of your largest corporate clients is a sound approach. However, determining how best to get your Client Teams working effectively may require expertise that does not currently reside in your firm. In those situations you need to retain the best resource you can find to educate or supplement your internal professionals.

8. Constantly measure your progress.

Assign resources and budgets to each initiative. Develop a means (such as a balanced scorecard) to measure results; focus on leading indicators; make the number of metrics small but significant in terms of impacting future goals. Continually monitor implementation to ensure the expected benefits are being realized.

Let's face it. If there was some secret or shortcut to effectively executing your firm's strategy – we would all be doing it. Unfortunately, there isn't. It requires a great deal of dedicated persistent effort and a lot of unbillable time. If there is any good news to this situation, it is that most of your competitors will not be able to pull it off. So can you be the exception and thereby reap the rewards?

SIDE BAR:

CONSIDER A STRATEGIC PLANNING PREMORTEM

You are now at the stage of having worked with the members of your Strategic Planning Committee (SPC) for a number of months to finally come to the point where you have a draft strategic plan that has been approved by the partners and now needs some attention directed toward how certain components will actually be implemented. There are a number of actions contemplated that your fellow Committee members feel are critical and definitely need to be properly executed in order to make a significant difference. As an example, one such action item states:

Develop and codify in writing, a set of 'Client Service Standards' that are accepted and consistently used by all attorneys in every practice area.

There is some discussion and concern amongst the members of your SPC as to how this is going to be effectively implemented. The concern emanates from a sense within the group that it has traditionally been very difficult to get lawyers to perform consistently, even so far as getting in their time-sheets on a regular basis is concerned. What to do?

As everyone knows it is common practice to conduct a "postmortem" or lessons learned session upon completion of any major undertaking. If your endeavor achieved its goal, the questions typically focus on what went right, what we did well, and how we might sustain our success. If your initiative fell short or failed to meet expectations, your postmortem efforts tend to focus on what went wrong and how we got off track.

That said, this may be a time to think about conducting a 'premortem.' A Premortem is a process to aid in identifying the potential roadblocks, *before* they have a chance of derailing your implementation efforts.

In a spirit of full disclosure, I confess to borrowing the term “premortem” from a *McKinsey* article entitled “Strategic Decisions: When Can You Trust Your Gut?” Not only is the article a fascinating read, it supports my belief that a good way to help ensure effective execution of your strategic planning specifics is to ask postmortem-type questions before, rather than after, the fact.

Here is how a strategic planning premortem could be preformed.

- Ask the members of your Strategic Planning Committee to assume that their draft strategic plan or some critical but contentious component of the plan (like the action item identified above) has either failed in it’s efforts to be executed or has been totally rejected by the partnership.

Your instructions to the group might be: “Everyone take two minutes and write down all the reasons why you think the undertaking failed.” This exercise asks the members of your group to be self-critical, before they prepare to move forward in implementation, and gets people to voluntarily engage in devil’s advocate thinking before the specific action item even gets started.

The team members can then be given a few minutes to individually write down all the reasons they can think of regarding why the plan has failed. Your role as a facilitator would be to have each member announce what is on his / her list.

In some instances, your fellow Committee members may lack the foresight to spot shortcomings. They may be so confident that they don’t see the need for a critique. In those situations you may benefit from bringing in some objective, trusted partners to read, review and serve as devils advocates to help identify any areas of the plan that may spark contentious debates.

- Now have the SPC members then determine different ways and actions they could proactively take to prevent the implementation of the specific action item from failing or being rejected.

Ask every member of the Strategic Planning Committee to suggest at least one action that they believe could help to reduce the likelihood of the plan being rejected – including possible revisions to the plan. You may likely hear, as I did when conducting this exercise recently, a number of creative ideas like:

We could enlist a group of our more senior partners who are well-respected throughout the firm for their gifted client service abilities, as our ‘blue-ribbon panel,’ to help construct the client service standards based on the kinds of actions that they take on a regular basis.

We could gather together a group of key clients to provide input into what our client service standards might include.

We could publish the service standards on our web site and in engagement letters such that every client was made aware of the standards and knew what to expect from the lawyer serving them. This would serve as a catalyst for ensuring consistent behavior from amongst our lawyers.

Conducting a premortem can help you identify potential problems that otherwise would not have surfaced until they caused major damage to the strategic implementation efforts. This process is intended to heighten your Committee's sensitivity to potential areas of contention and then prepare to either counteract or address those areas in a proactive manner. The goal is to prevent potential problems from occurring in order to increase the likelihood of success. For the amount of time invested, a strategic planning premortem is a low-cost, high-payoff activity.

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