

Advanced Components



Practice Planning Process

Goals Everyone should appreciate the firm is committed to fair processes and availability of opportunities

Objectives Improved attorney performance, a fair career development process, and reduced turnover of good fit attorneys.

Process Steps

- 1 Select approach: Structured using demographic criteria or bespoke based on individual attorney roles.
- 2 Develop hourly guidelines (client work & non billable): Consult the firm's economic model, budget, client needs, and model attorney criteria.
- 3 Define individual goals and expectations
- 4 Prepare each plan using suggested activities by demographic or individually defined activities
- 5 Individual attorney meetings and feedback schedule
- 6 Macro capacity (total firm) plan informed by individual plans

Deliverables: ✓✓✓

Written **practice plan** for each attorney and follow up schedule

Alignment between **attorney & firm** goals

More informed **budgeting & forecasting** processes



Expanded Compensation & Incentive Plans

Everyone should understand who is getting ahead and why.

A compensation structure that promotes long term success and establishes a clear connection between behavior & compensation.

Process Steps

- 1 Definition of compensable factors (objective and subjective)
- 2 Schedule of salary evaluations & bonus payments
- 3 Process for setting and adjusting base salaries
- 4 Process for calculating objective and subjective bonuses
- 5 Guidelines and policies regarding any objective formulas.
- 6 Explanation of any applicable alternative compensation plans

Deliverables: ✓✓✓

Written compensation **policies, guidelines, and structure**

Support tools to ensure that **the plan** is administered properly

Pay adjustment and **bonus pay** schedule



Training & Development Solutions

Enabling lawyers to reach their full potential faster

The training and development program should result in increased profitability, reduced turnover, and better client service.

Process Steps

- 1 Create the training program scope (legal skills, practice skills, client service, marketing, etc.)
- 2 Select training approach (online, written, personal instruction, in-house custom, external, etc.)
- 3 Create training budget
- 4 Create group and individual training plans
- 5 Create compensation plan for training contributions

Deliverables: ✓✓✓✓

Program strategy, **goals & expectations**

Training plans, **budget, & delivery method**

Attorney and **group training** plans

Rewards system for **attorneys who** provide training



Recruiting & Hiring Processes

Attracting and retaining best fit lawyers whose association with the firm transcends money

To identify, attract and successfully hire the best fit attorneys.

Process Steps

- 1 Create a recruiting strategy (prospective, need based, targeted)
- 2 Create/revise hiring criteria - new law school graduates
- 3 Create/revise hiring criteria - lateral hires
- 4 Document hiring processes including policies & procedures
- 5 Create interviewing rules and process tools
- 6 Consider incentives and rewards for recruiting contributions
- 7 Policy regarding outside recruiters
- 8 Create a hiring plan and budget

Deliverables: ✓✓✓✓✓

Strategic **recruiting plan**

Comprehensive **hiring criteria** criteria

Documented **interviewing & hiring** processes

Written recruiting **interviewing & incentive** plan (if adopted)

Annual **hiring plan & budget**



The Employee Experience

Creating a natural inclination toward collaboration and service

To ensure that firm life is a positive and nurturing experience.

Process Steps

- 1 Definition and feasibility of important firm life factors
- 2 Score the firm's performance in key firm life areas
- 3 Solicit input from all attorneys and staff
- 4 Identification of improvement areas
- 5 Exit interviews (where possible) for all people who have left the firm in the last 3 years

Deliverables: ✓✓✓✓✓

Firm life **improvement plan**

Ongoing **feedback system**

Exit interviewing **policy & system** plans

Communication **protocol** - informal & structured



Work/life Blend

Everyone should appreciate the firm is concerned for their total well-being

To create a nurturing environment that goes beyond the typical work for pay approach.

Process Steps

- 1 Survey the attorneys to solicit input on the most useful services
- 2 Define the scope of the program, rules, guidelines, and services offered
- 3 Development of self-help tools & resources guide
- 4 Evaluate and select a network of potential professional resources to assist with providing services
- 5 Evaluate the costs of the program & services provided

Deliverables: ✓✓✓

Written personal **development & career counseling** services brochure and usage guide

Published **self-help & resource** options

Financial support document outlining the firm's **financial commitment** to the program & costs to participants as applicable