

**MASSACHUSETTS
LAWYERS WEEKLY****'Trip-Tik': a guide from yesteryear**

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Expert Opinion

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When I was young, my family took automobile vacations where we would all pile in the car and head off to an exciting destination. My father would go to the AAA to request a "Trip-Tik" and would pore over the maps. With a page-by-page description of each phase of our trip, we'd look at blow-up maps showing details of each area; we'd look at the red arrows and notes that highlighted construction zones to avoid. We'd find interesting little-known places along the way to make the trips more exciting.

Now when we plan a trip, we simply plug a destination into a GPS device and follow the friendly voice. We still start off by setting a destination; however, now we simply follow instructions and do not know as much about our journey.

Not so with strategic planning for a law firm. Not only do you need to know where you want to go, you need to recognize that there are multiple roads to take. Each will offer a slightly different journey; some are more direct and some more winding. Some have construction sites, and some have dead-ends. There is no "voice" telling you the best way to get there. Making a plan and understanding each page of your "trip-tik" is critical.

Teamwork recommended

First you must decide who in the leadership of your firm will be responsible for creating the strategic plan. Then your legal administrator can play an instrumental role in preparing the "trip-tik" that will be needed to get there.

Your plan should be simply stated; otherwise it will be too challenging to implement and will sit on a shelf. It should have a reasonable time frame; if your goals are too far away, you won't start taking your first steps.

Look at where your firm is today and what you want your firm to look like. The goals should be realistic. For example, you might say that in three years you want the firm to be a particular size; you might want to increase your firm's profitability; you might want to expand the scope of your practice areas; you might want to strengthen your leadership by creating a transition plan from one generation to the next. These goals should be articulated in one or two pages.

Your master strategic plan does not need to have all the details; it does need to point you in a specific direction. Your plan should be the check-point against which all your activities are measured.

Each page of the "trip-tik," or each phase of the plan, should have its own reasonable goals. These become the documents to support your plan, helping to identify the steps you will need to take to follow your plan. For example, your plan might indicate that you want to be a bigger, more profitable firm. You might assign one "team" to understand your profitability and what steps to take to improve this while a second "team" might work on recruiting lateral partners.

Your reality check will occur when you ask: "Is the hiring of this partner going to help both our growth and our profitability?" If so, then you are following your strategic plan. If not, then you should re-examine that particular hire.

Your plan should be flexible enough so you can react to opportunities; roadblocks or shortcuts do come up. Assessing them against your plan will help you make decisions.

Keep it simple

If it's too complicated, it will be ignored. Review your plan regularly, and update it annually.

The people involved with implementing the plan must communicate to the firm the actions they are taking and must be accountable.

Recognize that your goals might shift or change; the successes or failures along the way may introduce new goals.

To make the most of a strategic plan, you need to visit it regularly. Enjoy the little side trips you may choose to make along the way, and never lose sight of where you want to end up.

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