Focus Efforts on the Right Firm Initiatives Using the Smart Work Matrix

By LawVision on November 29, 2012

I recently came across a powerful yet fairly simple tool called the Smart Work Matrix. It helps directors and CMOs in law firms focus energies only on initiatives that have two key elements: 1) an opportunity for high positive impact for the firm; and 2) the potential that lawyers at the firm will drive it to completion.

The Smart Work Matrix is the brainchild of Allen Fuqua, CMO of a 300 lawyer Dallas based firm. Allen was on a panel I moderated at the annual Continuing Marketing Education Conference hosted by the Legal Marketing Association in Los Angeles (great new TED-like format, by the way). The panel presented decision-making tools from three great innovators.
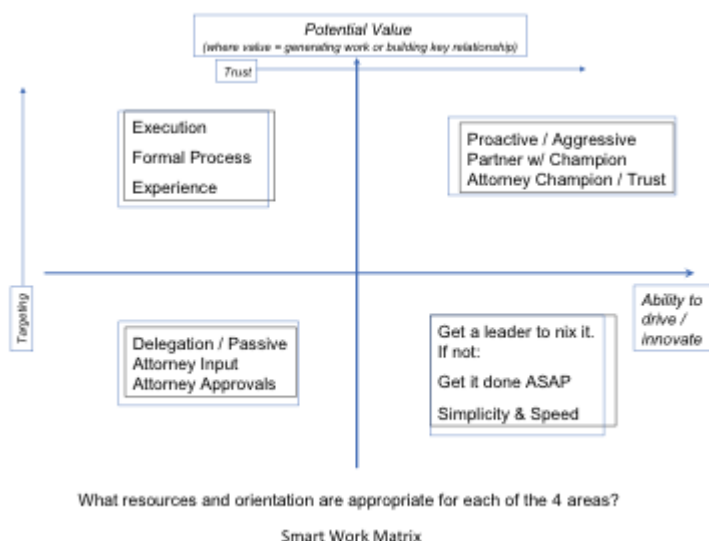
Allen delivered a direct and often hilarious summary of projects and initiatives he's tackled during his career as a law firm CMO. He concluded that some initiatives aren't worth pursuing with the same amount of resources and personal orientation. He put a real bullet through the heart of the old saying, "Anything worth doing is worth doing well" — not so true in Allen's experience.

He offered the firm's annual holiday card as an example. For years, the marketing communication manager spent time and resources each year with a crack design staff to create the firm's perfect customized card, only to have it edited, nitpicked and destroyed after continuous input and drafts. Upon completion each year, he'd realize that they had spent way too much time and involved way too many lawyers in the decision-making process and hadn't really made a significant impact on the firm's top-line revenue. Other projects often came out the same way. Some projects, on the other hand, were the reverse — projects where his team could shine with critical lawyer "buy in" and drive, resulting in high impact to the firm.

He also noticed something else. When an initiative failed, the debrief often revealed no one on the team was really all that surprised by the failure. He'd ask, "When we spent all that time and then got shot down, were you really surprised?" Often the response was something along the lines of "No, that practice group always responds that way, they think (insert type of project here) is a waste of time."

An epiphany came for Allen when he realized that if much of the behavior and response from his lawyers was predictable and if he could place a relative value on positive impact for the firm, he was committing CMO malpractice if he didn't have a systematic way to predict it. If he could measure those two things, he could spend the majority of his time on those things that would drive success.

The Smart Work Matrix is the culmination and execution of Allen's thoughts. It's simple in design but has helped him prioritize his projects at his firm. Maybe it will help you. Take a look. The first diagram describes the quadrants and the second is an example of how to use it as a worksheet for your own decision making.

Smart Work Matrix Worksheet

What resources and orientation are appropriate for each of the 4 areas?

Smart Work Matrix

The matrix directs you to ask two basic questions about the initiatives you are contemplating:

1. Does it create high value and positive impact for the firm?
2. Is it something the marketing group can drive or innovate to completion?

"Value" becomes the vertical axis and "Drive/Innovate" becomes the horizontal axis. With the axis in place, you simply plot proposed projects in their appropriate quadrants. Subjective value judgments are inherent in the plotting, of course, but those subjective discussions direct the internal debate to the right questions.

One final benefit Allen didn't mention at the conference is the utility of having a methodically written and graphed record of why certain things were attempted in any given year at the firm. It's a handy tool for your annual review and even handier for that ever-present grumbling partner who is wondering why we aren't doing the "cool stuff" that "firm x" is doing

across town.