

When to Take a Pass on Strategic Planning

By [Michael D. Short](#) on July 9, 2014

We devote a fair amount of time and effort in this space to the virtues of having a strategy, constantly revisiting and revising the strategy, aligning all aspects of the firm with the strategy, and actually implementing the damn thing.

There are times, however, when strategic planning simply doesn't make sense. We sometimes see law firm leaders or partnerships are facing very difficult challenges that a strategy simply cannot fix, yet the process is being used as a proxy/diversion/smoke-screen when other more appropriate solutions exist.

Example scenarios include using a strategy to –

- Unify a divided partnership – If the partnership a) includes several antagonistic factions or recently experienced a split down the middle on a very important issue, b) elevates many important debates to a level of personal attacks (as Partners often do), and c) is looking for a strategy to rally the troops and point everyone in the same unified direction to miraculously create a state of mutual respect and kindness, a strategy is not the cure. Effective planning under these conditions is nearly impossible. The planning committee will have a representative of each warring faction and the resulting strategy will likely fall well short of its potential because it will be watered-down to placate all constituencies. The strategy will sound like a resolution from the United Nations.

The real solution here is to contact one of the organizational psychologists with law firm experience and re-learn how to communicate, argue constructively, and act like a true partnership first. *Then* develop a plan.

- Placate disruptive forces – If the partnership includes a few loud, vocal, powerful, and often disruptive “near-jerks” (but not *complete* jerks because then they would be in violation of the no-jerks rule and would most certainly be kicked out of the partnership) and the thought is to reform and/or control these Partners by giving them a very important responsibility, please don't use strategic planning as your olive branch. The resulting plan will likely fall well short of its potential because it will favor the practices of these Partners; management and other Partners will view it as being highly biased (even if it miraculously isn't); it will not be embraced and implemented; and the disruptive forces will become more agitated because now – in addition to all other gripes – no one is following the brilliant plan that they were asked to develop.

The solution here is to develop a real plan with the real strategic thinkers in the firm, see if each of these people fit against the plan's goals, and have the courage to ask those who don't currently fit to try. Also, have the guts to apply the no-jerks rule if any of the Partners are jerks.

- Justify prior moves – If your law firm is a patch-work quilt of largely unrelated practices, industry teams, offices, and/or client-types, don't try to create an all-encompassing vision – now – to retrospectively justify the assets you have assembled. A strategy is always forward looking – no exceptions. It is important to take stock of the firm's assets and understand why they were sewn together, but only for positioning the firm successfully in the future. Might some of these assets not fit into the vision? Sure...in which case they adapt or are removed.

The ideal solution would be to go back in time and build the firm according to a strategy, but until the IT department learns how to time-travel you must simply accept what you have, hope that you at least maintained a high level of quality as you acquired assets, and move forward.

In addition to the scenarios described above, there are also certain times when strategic planning makes little sense, such as –

- A pending leadership change – There is little sense in developing a strategy with a regularly scheduled leadership change in the near future, thus forcing a strategy on the new leader(s), unless a) they were involved in the process and everyone is in agreement that a successful implementation requires the new leader(s), or b) the strategic visions of the candidates are articulated and considered by the partnership during the vote.
- Immediately after a merger inquiry – Merger activity is very high right now and we are hearing from many firms that have recently been contacted by a respected competitor and don't know how to respond to the inquiry because they don't have an established strategy to use as a framework for evaluation. Their solution is to do a "quick" strategy to create the necessary lens needed to determine the "fit" of the opportunity. Unfortunately, "quick" often equates with "weak" when associated with strategic planning. If the merger evaluation can be put on hold until the strategy is properly developed – great. Otherwise, there is a risk that the resulting strategy is influenced by the opportunity at hand.
- When the current plan is expiring – We occasionally receive RFP's for strategic planning services "because our existing plan is about to expire". A strategic plan is a firmwide mindset and commitment toward shared goals that are constantly reviewed and updated. It is not a document, a task on a checklist, or a product with an expiration date.

Just as a partnership looking at a merger inquiry (above) needs a framework for evaluating the deal, law firm leaders sometimes need a framework for evaluating when a strategic planning effort makes sense. If you are not trying to develop a firmwide mindset and commitment toward shared goals that are constantly reviewed and updated, please strongly consider taking a pass on strategic planning until that *is* the goal.