

CHALLENGE

- 12-year-old family law firm with 3 partners (2 equity, 1 non-equity) and 3 associates.
- Firm was founded by 2 attorneys that left a mid-size firm to form their own.
- The firm has experienced steady growth but was disorganized and indiscriminate when it came to managing the caseload. This created a stressful environment where lawyers and staff felt overworked, clients were not being responded to, and an experienced paralegal had recently left for another firm.
- Two of their associates shared their interest in becoming partners but the founding partners had not provided them with any criteria or guidance on how to get there.
- They had an office administrator that was with them for 10 years, but she had personality conflicts with most of the attorneys and staff.

SOLUTION

ALIGNMENT

- To create alignment among the partners around the opportunities, challenges, and a plan forward, we assessed the perspectives and experiences of key stakeholders within the firm.
- Facilitated a 1.5-day planning session designed to promote candid and productive communication between the founding partners around their concerns, challenges, strengths, collective vision, and solutions.
- At the conclusion of the planning session, we had a clear picture of the firm's vision/mission/values, a well-defined culture, a list of short and long-term goals for the firm, and specific tasks with timelines and assigned task owners.

ENGAGEMENT

- Helped the founding partners to establish formalized expectations of themselves, the other lawyers, and staff.
- Addressed the damaging and disruptive effect the office administrator had on workload management, client service, and firm morale.
- Established targeted client profiles to serve as a guide for identifying opportunities for the firm to be lucrative and impactful.
- Developed a strategic marketing initiative to position the firm for lawyer-to-lawyer referrals.
- Created a *client journey roadmap* laying out the firm's processes for acquiring, onboarding, and delivering excellence to prospective and current clients.
- Established an organizational chart clarifying responsibilities and a supervisory structure.
- Developed a tailored engagement strategy that included a *branding bible*, universal messaging, guidelines for firm citizenship, a formalized employee onboarding program, and measurable goals for recruitment and retention of both employees and clients.
- Designed a thought leadership platform as a marketing tool for one of the founding partners.
- Provided quarterly business development strategy, guidance, and accountability for partners and select associates.

SOME OF THE RESULTS

- The expectations document coupled with the engagement strategy alleviated undue stress and improved the retention of attorneys by providing clarification on how to fulfill both firm and client expectations, as well as laying out a clear path to partnership for those interested in joining leadership.
- The engagement strategy led to the replacement of the office administrator with a more qualified professional that reduced office conflicts and improved efficiencies in billing practices, processes, expenses, and management. (\$72,000+)
- The partners scheduled agenda-led monthly meetings with the team to provide a regular cadence for communication and foster a defined and healthy culture.
- Partners generated 6 new lawyer referral sources that led to 3 significant client matters. (\$90,000+)
- Raised partner rates by \$35/hour and associate rates by \$25/hour - also translated into higher flat fees. (\$300,000+)
- Internally generated referrals of 2 hires saved firm on recruiter and advertising fees. (\$25,000+)

MINIMUM PROJECT ROI (1ST YEAR): **\$439,000+**