



## **MPF FEATURED RESOURCE**

**Presentation Handouts and Results from Audience Polling Technology**

**SIT ON THE SIDELINE OR GET IN THE GAME:**

## **STRATEGIC PLANNING**

**John Remsen, Jr.**

President, TheRemsenGroup

**ALA's 2014 Annual Conference & Exposition**

Toronto, Ontario, Canada


May 21, 2014 ♦ 2:15pm – 3:15pm ET

**TheRemsenGroup**

727 Kirkwood Avenue - Atlanta, GA - 30316  
404.885.9100 - [www.TheRemsenGroup.com](http://www.TheRemsenGroup.com)


# Sit on the Sideline or Get in the Game: Strategic Planning

ALA 2014 Annual Conference – May 21, 2014



**SIT ON THE SIDELINE OR GET IN THE GAME:**  
**STRATEGIC PLANNING**

John Remsen, Jr.  
TheRemsenGroup



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**JOHN REMSEN, JR.**

- President, TheRemsenGroup  
President & CEO, Managing Partner Forum
- Previous:  
Gunster, Porter Wright
- More than 280 law firms since 1997
- Speaker:  
American Bar Association, Association of Legal Administrators,  
Legal Marketing Association, MPF Annual Conference
- Education:  
MBA – University of Virginia  
BSBA – University of Florida



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**AUDIENCE PARTICIPATION TECHNOLOGY**

- Instantaneous
- Anonymous
- Great benchmarking data
- Results will be distributed after the conference



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**TEST QUESTION:**  
What is the total population of metropolitan Toronto?

| Option         | Percentage |
|----------------|------------|
| 1. 3.5 million | 34%        |
| 2. 4.5 million | 25%        |
| 3. 5.5 million | 30%        |
| 4. 6.5 million | 11%        |

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**TEST QUESTION:**  
What is the total population of metropolitan Toronto?

**5,583,064**  
(2011 Canadian Census)

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**How Many Lawyers at Your Law Firm?**

| Option               | Percentage |
|----------------------|------------|
| 1. < 20 lawyers      | 33%        |
| 2. 20 – 50 lawyers   | 27%        |
| 3. 51 – 100 lawyers  | 13%        |
| 4. 101 – 250 lawyers | 12%        |
| 5. > 250 lawyers     | 14%        |

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### LONG-TERM TRENDS

- The Economy Is Globalizing
- Technology Is Expanding/Improving at Breakneck Speed
- Clients Are More Demanding
- Competition Is Much More Aggressive
- BigLaw Is Getting Bigger
- Disruptors Will Continue to Proliferate
- Record Level of "Merger & Acquisition" Activity
- Successful Law Firms Must Be Run More Like Businesses

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**Lawyer Personalities**

- Highly skeptical
- Hate change
- Risk averse
- Love autonomy
- Low resilience
- High sense of urgency

Source: Dr. Larry Richard – LawyerBrain, LLC

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**TIME TO LOOK FORWARD  
AND INVEST IN THE FUTURE**

- Clients
- People
- Firm

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**FOR LAW FIRMS, STRATEGIC PLANS  
ARE NO LONGER OPTIONAL.  
THEY ARE AN ABSOLUTE REQUIREMENT FOR  
VIABLE, SUCCESSFUL LAW FIRMS OF THE FUTURE.**

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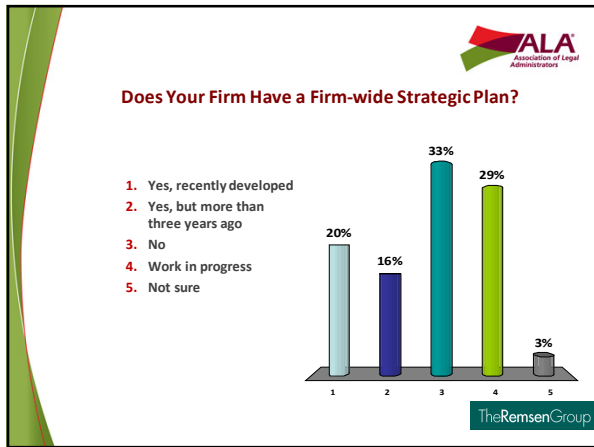
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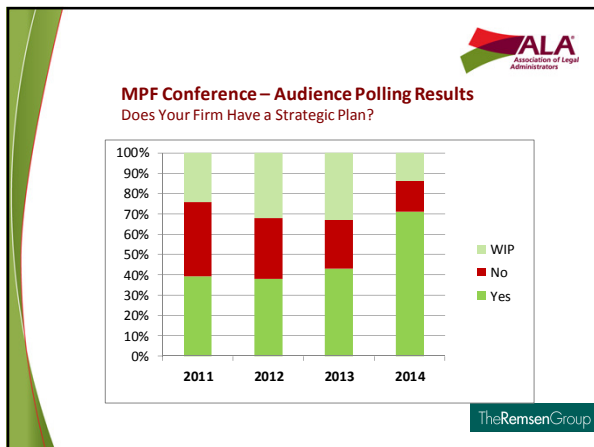
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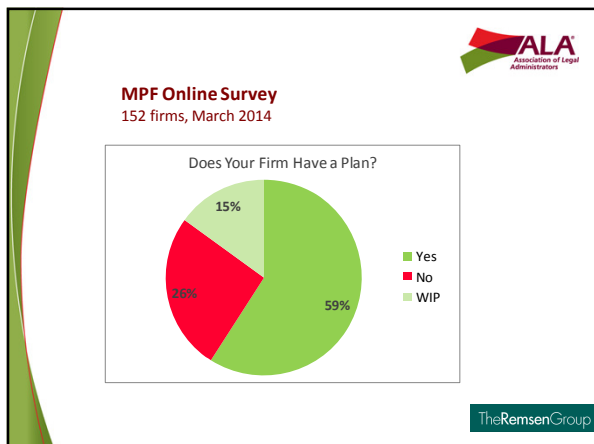
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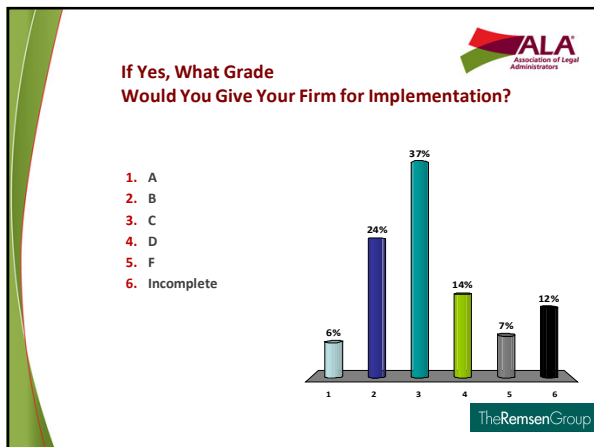
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- GETTING STARTED**
- Make the case, create a sense of urgency
  - Gain unwavering support from firm leadership
  - Determine and set forth the process and timeline
  - Be inclusive – seek input from partners, associates, staff
  - Talk to clients and referral sources
  - Gather and analyze data – facts, not opinions
  - Consider outside consultant
  - Be flexible – take it where you can get it
  - Communicate, communicate, communicate
- ALA Association of Legal Administrators
- TheRemsenGroup

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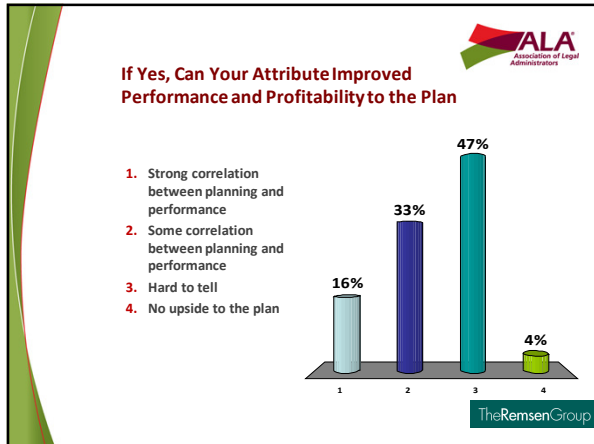
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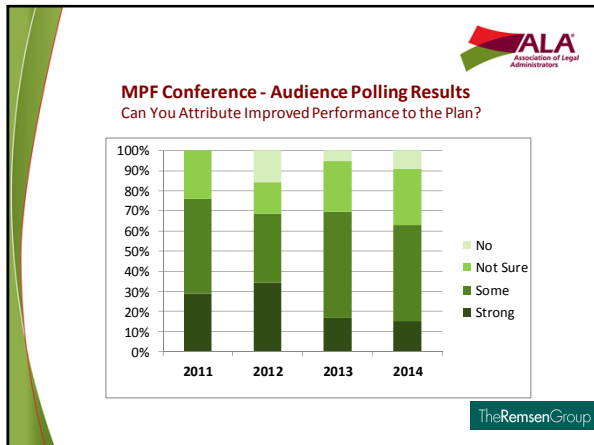
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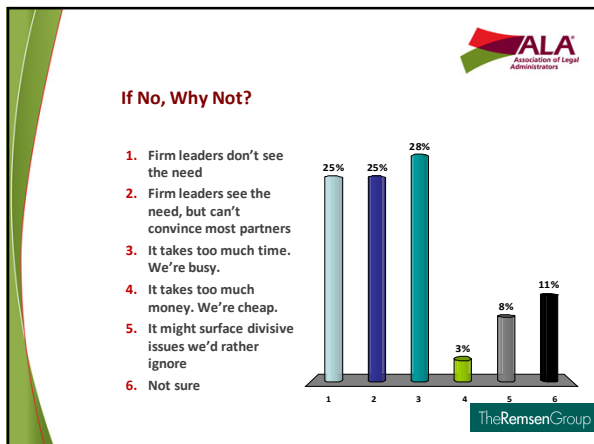
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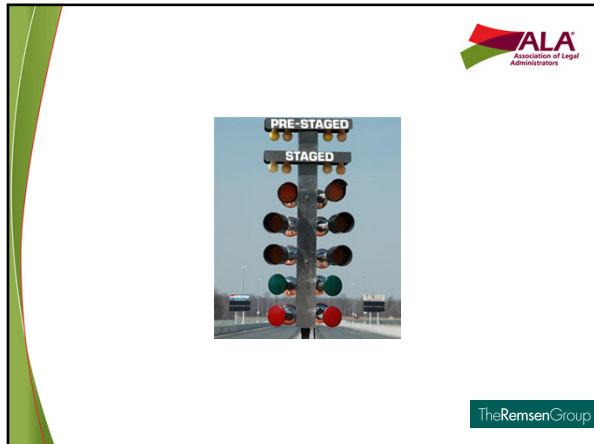
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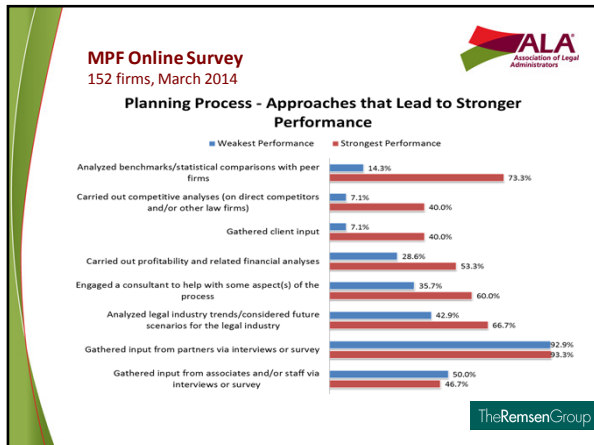
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### INGREDIENTS IN A GOOD PLAN

- Vision – Looking out five years
- Firm size, client mix, practice mix, geographic footprint
- KISS (Keep it Simple, Stupid)
- Firm-first culture – internal communication, sharing, teamwork
- Leadership and governance – decision-making, job descriptions
- Current clients – great service, feedback, site visits, seminars, etc
- New clients – industry-focused practice groups, organizations
- Associate training and development
- Investments in marketing and technology



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### KEYS TO SUCCESSFUL IMPLEMENTATION

- Focus on Just Three Things
- Reinforce Genuine Commitment from Leadership
- Monitor and Establish Accountability
- Measure and Reward Desired Outcomes
- Start with Pilot Projects
- Trumpet Success Far and Wide
- Know that Mistakes are Deal-Killers



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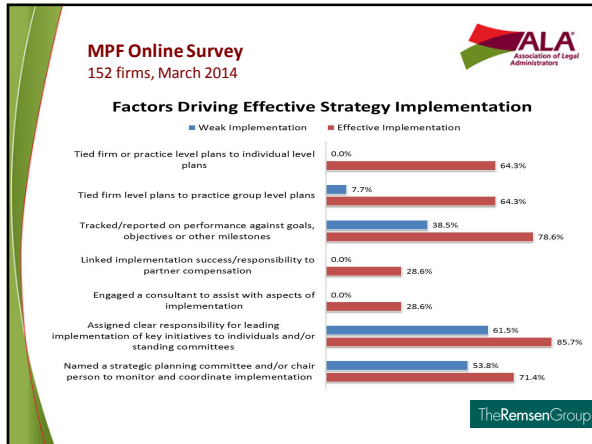
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- TIPS FOR FIRM ADMINISTRATORS**
- Build/maintain strong relationship with your managing partner
  - Be a champion for strategic planning
  - Establish ongoing internal communication within your firm
  - Share trends and benchmarking data with partners
  - Circulate articles and white papers
  - Help partners charged with assigned tasks
  - Help identify and groom future firm leaders
  - Be flexible, be patient, keep beating the drum
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**ADDITIONAL RESOURCES**

- [ManagingPartnerForum.org](http://ManagingPartnerForum.org)
- *The Lawyer's Guide to Strategic Planning*  
by Thomas C. Grella, Esq. and Michael L. Hudkins
- *True Professionalism:  
The Courage to Care about Your People, Your Clients and Your Career*  
by David H. Maister
- *Leading Change*  
by John P. Kotter
- *The Extraordinary Managing Partner:  
Reaching the Pinnacle of Law Firm Management*  
by John J. Michalik, JD



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**CONTACT US**

- John Remsen, Jr.  
404-885-9100  
[jremsen@theremsengroup.com](mailto:jremsen@theremsengroup.com)



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***Your opinion matters!***

Please take a moment now  
to evaluate this session.

*Thank You!*



Your connection  
to knowledge, resources and networking

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