

The Thrill is Gone: Sustaining Momentum and Managing the Implementation of a Three-Year Marketing Plan



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The process of creating and implementing a marketing plan can be lengthy and arduous. There are lots of meetings at the front end to establish objectives and goals and even more meetings to establish the necessary buy-in from various constituencies throughout the law firm to ensure the support from management and firm leadership. If things move along as expected, you will be ready to implement the plan after about three months.

For most firms, there is excitement and momentum when a plan is newly developed and working teams have been formed to begin implementing the objectives. For approximately six months after the plan has been adopted, lawyers and the marketing department are working closely together to make it a success.

But then a big case or deal comes in. Lawyers get consumed. Members of the marketing department work hard to stay focused on the plan, but they get hit with daily opportunities and “special” one-off requests by the partners. Progress starts to slow down or stops altogether.

Successfully sustaining momentum has much to do with the marketing and business development planning process a firm goes through, the duration of the plan, the components of the plan, the implementation teams around action items, the level of involvement from firm leadership and the way progress is tracked and communicated to everyone at the firm. As the chief marketing officer or marketing director and the person responsible for keeping the plan on track, how do you keep lawyers and the marketing group motivated?

First, Why a Three-Year Plan?

All things considered, a three-year plan provides a long-term view but is still actionable in terms of implementation – a good way to go. Of course the plan will change over the course of three years, but typically, this timeframe provides the long-term guidance needed by the decision-makers and those who need to put the plan into action.

Five-year plans can be too abstract or complicated. They are often overly aspirational or, if they are appropriately detailed, they can have an overwhelming effect on people. And of course, ownership and accountability diminishes with long-term plans.

To position the firm for success, the marketing director or CMO should think about the implementation strategy at the beginning of the plan-development process. Each firm’s culture is different and the appetite for change will determine how quickly the action items can be pushed forward. Understanding this ahead of time is critical in order to manage the expectations of the lawyers and of firm management. Establishing various benchmarks or measurable activities for success along the way is important to sustaining enthusiasm, and it shows that success lies in the process as well as in the outcome.

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Many firms struggle with strategic planning because it’s difficult to include all the different areas of the firm into one large plan. Indeed, the broader the plan, we often find the harder it is to establish accountability. There is no substitute for a firm-wide strategic plan in order to set the course for the firm and to ensure that all firm members are pulling in the same direction. However, creating smaller, action-oriented plans that flow from the strategic plan have many benefits, including ensuring greater accountability and encouraging the participation of more lawyers in the implementation phase.

Working the Plan: The Thrill is Not Gone

In addition to the broader strategic plan, developing a three-year plan that is action-based will help keep things on track.

So what do we mean by action-based? In addition to strategies, be sure to have goals in the plan. If we were to call “where the firm is now” point “A” and the vision statement, or what the firm wants to be, point “B”, the goals are the vehicle, or what the firm has to do, to get from point “A” to point “B.” If the goals are achieved, then the vision will have been achieved.

Also, be sure to have tactics or action items that accompany each goal (things that people must do). When done, the action items should achieve the goal.

Another important factor in sustaining momentum is hav-

ing working teams around each action item, and including a manager-level marketing department member on each team. Working teams should have clearly identified goals and deliverables. Team members need to understand the timeframe for completion, as well as the format of the deliverables.

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For example, the three-year marketing plan may include a strategy for enhancing client relationships. This strategy may have a goal of launching a client-service interview program. One of the action items for the working team will likely be to develop a list of a set number of clients and a process for how and whom will be contacted as part of a client-service interview program.

By clearly articulating goals at the onset of the committee's work, the team members can concentrate on "working the plan" rather than "planning the work." Since the plan has already been approved and the committee's role is clear, the focus is not on reviewing the goals and objectives in the plan – a digression that bogs down many committees who are tasked with implementation – the focus is on getting the job done.

How Can Firm Leadership Get Involved?

In order to sustain momentum, attorneys need to know that firm management is committed to implementing the plan. The marketing manager on each working team can provide progress updates to the marketing director or CMO for quarterly status reports to the executive committee or other members of leadership responsible for the plan's implementation.

As the marketing director or CMO, you need to understand how, or if, attorneys will be held accountable by firm management. Will their participation (or lack of) be considered at compensation time? Will attorneys who are particularly active in rolling out the plan be rewarded through a bonus fund? Even if there aren't specific "carrots and sticks," implementation can still be a success. Don't underestimate the power of peer pressure or competition among groups. Having the leader of the working teams report to the partnership can be a powerful motivator to accomplishing the tasks outlined for the committee. It typically lights a fire under the entire working team.

Tracking and Reporting on Progress

In order to keep people motivated to make progress on the action items or initiatives, they need to know that others are actively working the plan and noticing their accomplishments. Without that knowledge, a busy lawyer will not see the plan's implementation as a valuable use of his or her time.

Finding opportunities to tout successes and wins is critical throughout the implementation phase. Since the action plans have been designed with specific deliverables and outcomes, the CMO or marketing director should be able to point to specific successes as the working teams make progress.

The more specific and quantifiable the successes, the better.

Did the efforts of a working team lead to a successful client interview? Did that interview lead to sustaining the client work over a longer period of time and/or did it result in additional work? Did a practice group target a new client with success? Did two practice areas or industry groups successfully cross sell? Has the formation of a client team led to more work in new areas? Find ways to celebrate those successes in partner meetings, practice group meetings or retreats.

Sustaining the Momentum: a Never-Ending Commitment

Strategic plans should be dynamic and evolve as new opportunities come to light or as the firm's needs change. Revisiting the plan to re-examine priorities and goals in light of new developments is critical to success and shows the lawyers that you have an eye on the marketplace and an eye on the firm's appetite for change and growth.

Update the strategic plan after one year and use that as a starting point for reviewing the progress of each working team and to shuffle projects and team members to ensure continued progress and enthusiasm. Too often, firms allow their strategic plans (and their action plans) to collect dust and don't update them to reflect new circumstances. Failing to keep the plan current and relevant ensures that progress will be slow and momentum will be lost.

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By shaking up the working teams – with new members, new priorities or an expanded scope of work – lawyers stay engaged. With new ideas and approaches to problem solving, the teams will have a renewed focus on successful implementation. Planning is a two-steps-forward, one-step-back process. But by anticipating the potential challenges ahead of time, you can provide the guidance necessary to set your firm up for success. The planning process and the duration of the plan are important components to developing your implementation strategy and to setting the expectations of the attorneys. By involving firm leadership appropriately during the implementation phase, you can create the necessary platforms for reporting on progress, essential to keeping people involved. Lastly, by devising an implementation strategy that ensures a built-in process for change and evolution of the plan, you are signaling to the firm that the plan is dynamic and that the process is flexible enough to account for changes – internally or externally.

After all, if you're not changing your plan, you're not watching the market. ■

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