

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)



Full Episode Transcript

With Your Host

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I'm Melissa Shanahan, and this is *The Law Firm Owner Podcast*, Episode #167.

Welcome to *The Law Firm Owner Podcast* powered by *Velocity Work* for owners who want to grow a firm that gives them the life they want. Get crystal clear on where you're going. Take planning seriously and honor your plan like a pro. This is the work that creates *Velocity*.

Hi, guys, welcome to this week's episode. This is the third and final of a series that we're doing about lessons learned, that members and clients shared at the end of June at their Quarterly Strategic Planning retreat, as they were planning for, yes, the remainder of the year; but most especially, Q3.

The first in the series, was from Mastery Group. The second, was from private clients. And, we dug into those more, a little bit. So, I didn't share as many lessons because I was really digging in, in terms of conversation with you about those lessons. This, today, it's still private client lessons, but these we'll move through a little more quickly. It's a little easier to extract, at face value, the lesson and how to apply it to you.

You will hear some, of these lessons, that will resonate more or harder or stand out to you for some reason, they ping you differently than others. I would say, run with those. I share a lot of lessons learned here, and they're not unique to any one firm. It's just the experience; having gone through what they're going through, and through the growth, and making decisions, and executing on those decisions.

There's a lot of growth and learning that comes with that. That's what they're sharing here. All of this is going to apply to all of the firms out there. It's just, at what point in your journey are you?

If you're at a point in your journey, where for some reason, there's one lesson learned here that's like; oh my gosh, that. That feels like truth to me. It's something I need to sink into a little bit more. I need to think about a little bit more. I probably need to make some decisions around that.

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

Just focus on those and let the rest go. Otherwise, it can feel like drinking from a firehose, with these lessons learned. Especially when I move at a good clip through them. My best advice is, whatever you hear, that for some reason, you heard it in a certain way that mattered to you, run with those and throw the rest out the window. The other lessons will be there for you in the future. Just constrain down your focus to what made sense to you, when you listen to this.

Before I dive in, I want to make sure everybody knows this is the last week the enrollment is open this quarter, for Mastery Group. So, if you have been interested at all in working with me, with my company, I highly recommend you go to velocitywork.com/join. Check out the information, the doors are open, and they will be closing this Friday.

We would love to have you in, and get you all squared away and settled, so that you feel good for the upcoming Strategic Planning retreat. Which will be all about basically, planning the end of the year; Q4 planning. There's a lot of things you'll want to think through before that day.

That's why we have some space between now and the retreat, which will be towards the end of September. To make sure you do find your footing, and that you are prepared for that day, so that you can make the most of that day. That will be recorded so you can watch it back. But get the most out of that day for yourself. Yeah, we're here to walk you through that.

I want to make one clarification; that last week, I listened to what I said at the beginning. I said something about that we're only accepting a certain number of members so that we can make sure that they have the attention that they need and deserve, and get in and find their footing. Versus the existing members' space and how they run through things.

"Versus" was the wrong word. We continue to run, and grow, and develop what we offer current members, inside of Mastery Group. And, we are creating this pretty magical space for new members, so that they aren't thrown right in with existing members on every level. Because they would

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

appreciate, and we have learned over time, that new members could really use a hand in finding their footing.

So, it's not versus, it's not giving attention to new members versus the current members. It's, we're giving attention to new members, in addition to running our membership really well. So, that at the end of Q4, the new member, the batch of new members that we have, can be seamlessly integrated with all of the current members.

There'll be some integration there, everybody hangs out. Everybody's one community, but we offer some additional things to new members that will be really useful as you step into being a better owner. As you step into taking the reins and taking control over the things you have control over, and we guide through that, we facilitate that process. So, that's what I meant to clarify.

Okay, starting off with lessons learned. Again, these are private client lessons learned. The first one: "Motivation is key. Make tasks and processes as enjoyable as possible. Get creative to make things more fun." I thought this was great because it is important to keep things light-hearted and engagement high. There are ways to do that.

You can increase engagement by upping the level of fun that is had in your firm, and you can get creative with that. I mean think about acknowledgement, and how you can acknowledge your team so that they feel appreciated. Even that alone, makes things more fun. It could be ordering lunch in, it could be, you know, whatever, you guys get creative.

But it is important to give some brain space to that. Because if your team isn't motivated, it's going to reflect in your results. Motivation is key.

"The more expertise and confidence available on consults, the better. Having attorneys be more involved in the intake process; our conversion rates will go up. This allows them to use their expertise in the most valuable way for the firm, not just writing motions and briefs. Which, can be done by someone else."

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

This is an immigration firm. But I am putting it in here because I want all of you to think about this; what can you extract from what they now have understood? How can you infuse more competence and expertise upfront, towards the beginning of the journey, for people who are considering hiring your firm? How can you make it a done deal by using the expertise in your firm? Also, how can you make sure that they are using their brain to produce results for your firm, in a way that only they can do as attorneys?

You can think about this for other positions too. But I really appreciated this lesson. You have to remember, when they give these lessons learned, it's like done in their head. It's a total understanding that maybe they can shift in the future. But they don't wrestle with anything, they're not trying to find how they're best gonna do this.

When this blessing was delivered, it was done in their mind. They knew exactly what had to be done, and they'd already taken steps to make it so. Where can you apply this, to you? How can you think about, for yourself, how can you make expertise and confidence be delivered more upfront, in your lead conversion process? And, make sure you're getting the highest and best use of each team member's time?

In this case, we're talking about attorneys. But you can think about this for everybody. How can you use each person in your firm, to their fullest capability?

This next one kind of goes along with the first one that I read you: "Happy team members produce better results." Yes. I think it sounds so simple, right? Like, of course. But when you find yourself in a scenario where you haven't been focused on that at all, then you feel the neglect of it. And the results are suffering because motivation is suffering, because people aren't enjoying their positions, they're really not happy at the firm, it's just a job.

That is work. It requires work and effort, and energy and focus, to be able to provide the kind of environment that produces happy employees. Sure, the employees themselves contribute to that vibe. But it really stems from top down. Understanding that, is extremely important.

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

“Our team's definition of failure is inaccurate. We have an opportunity to present this differently, because their definition of failure is taking a toll.” This was great, because the more that you can educate your team, so that they can see the vision. And really understanding the path there, as you see it, can be useful when, if something didn't work, and they take that as failure...

Remember, the definition of failure is quitting. I think this is what people don't understand. You have an opportunity to share this with your team. True failure is when you quit. When something doesn't go the way you thought it did, considering that a failure is detrimental to the results that you're ultimately trying to create, for a bunch of different reasons.

So, when something doesn't work, as you expected it to, or it fell flat or whatever failure is, unless you quit... Help them understand that unless they quit, this is not failure. This is a part of the learning journey.

Now, learning from it is very important. Extracting lessons along the way, just like I'm sharing with you here, as the owners have done that I've worked with, is important. So, they should extract lessons every time something didn't work out the way they thought, or they're disappointed in something; themselves, or a result, or whatever. Have them process the lessons from that, so that they can carry those forward and create a different result as they move forward.

I think there's an opportunity here to help people, who haven't given much thought and haven't been taught how to think about failure, really sitting down and making sure that they understand that the only way to fail is to stop. That's it.

So, defining for them what failure is, and then helping them see what it is not. Using specific examples of goals that have been set, and efforts that you guys have put forth in order to reach those goals, and didn't get you all the way to the goal; that isn't failure.

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

It got you something, at the minimum it got you learning, which is so important. Helping them see that just because you fell short of a goal does not mean it is failure. You process the lessons and you carry them forward. You keep trucking towards the goal. You find a different way to approach it, a different effort that's going to be to your best guess, your best educated guess, that it's going to deliver you to the goals. And you put forth that effort, and you complete it.

Then, you measure where you fell, and then you keep trucking forward. The goal itself you never give up on; it's inevitable. That's how I want you guys to think about this; the goal is inevitable. We are aiming to hit this goal by X date. I mean, that's what makes a goal, right? By X date, we are aiming to hit this goal.

Many people have annual goals; my people, my clients and members have annual goals. By the end of this year, we're going to hit this goal. You put forth the effort required, that you've named during your planning session, in order to get there. Some of that effort, you're passing along to your team members. If they see that their effort is tied to meeting a certain goal, but it didn't do what they thought it was going to do, or what you thought it was going to do, that can be extremely deflating for your team.

You have to help them see that you have belief in that goal. And you are asking them to believe in that goal, no matter what. Whether the effort worked out, or it didn't. If it didn't, let's process the lessons and move forward. If it did, let's celebrate. Either way, it is worth a pat on the back for the effort that was put forth towards the goal.

Failure means you try something, it didn't work. Then, you shift your focus or you switch to something else, or you give up or whatever; it's quitting. It's when you stop. That's not what you're doing here at the firm, that's not they're doing at the firm. So, helping them understand that that means they aren't failing; they're learning and let's go. That can be really helpful.

Okay, next lesson: "There is a limit to how much we take from upset clients. We need a plan for how our firm handles this." This was good. I mean, I

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

think every client of mine comes to a point where they realize that they're not going to keep every single client. If a client is troublesome, and giving a lot of problems and rude to the team, there's a way to handle that, legally and ethically, and in a way that feels good to your firm.

Nailing that down, I think can be important. So, for you, I'm sharing this lesson specifically. Because if you're in a place where you've had enough of that, or you've had one experience of that, where you want to extract the lessons and be able to put something into place that feels right for your firm, do it. Don't wait for the next one to come around.

“Clarifying duties and people's roles helps a lot to determine necessary training. And, it makes it easier for everyone to follow procedures.” I'm going to read that, again; clarifying duties and people's roles helps a lot to determine necessary training. And, it makes it easier for everyone to follow procedures.

Yeah, so this is really getting clear. This goes back to accountability charts; I have done podcasts on that before. If you are in my world, we make sure to expose you to that, and be helpful with that. As a matter of fact, we're planning a workshop for Mastery Group. We've done one before, but we're planning another one, coming up, that will be all centered around accountability charts.

Accountability charts that make you get clear about the roles and about the responsibilities inside of the firm, and assigning someone to it. So, that they are very clear their name is next to each responsibility that they have, on their plates. There's no question. There's no, ‘a couple people are doing the same kind of thing.’

No, everyone has got their roles broken up. Everyone knows exactly if they are successful or not. That can be helpful, not just for morale and genuine joy at their job, because there's no question marks. They know if they're getting their stuff done or not. That makes it easier for them to follow procedures.

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

It identifies for you, as an owner or your management team or your leadership team, it's really easy to see, and to spot holes in the execution of the responsibilities in your firm. Sometimes it'll be very clear that you didn't have the proper training for the individual, they didn't have access to the proper training.

Sometimes it'll reveal that the training actually is there, it's aptitude that's not. There's something else that's missing, in terms of skill set or ability by the team member. Sometimes capacity, also. They always don't have the capacity because there's too much on them.

But you can see holes much, much more clearly. So, the clearer that you are with them, like list out exactly their duties and responsibilities and the role that they play. It makes you much more effective as a leader in your firm or as a manager or as an owner. You can't provide that clarity to them until you are super clear. And that's why the accountability chart is so great for the owner, first and foremost, and then of course, the team benefits from having that chart.

They didn't use the word "accountability chart" in this lesson. But they have an accountability chart that forces them to map, with specificity, the roles inside of the firm. That's what they're referring to with this. They have to get clearer and clearer and clearer. And, we were fine...

When I'm working with private clients, every single quarter, they refine their accountability chart. There isn't one client that doesn't touch their accountability chart, quarter to quarter. It's always shifting, changing; sometimes very small changes, and sometimes big ones. But there's always a shift, there's always a look at it. And, it's a conscious decision on what to shift or not.

I know that about them. I know that this is what the lesson is stemming from. Because they have this, and the more specific they get with it, the better and better things are for them. It's a good lesson learned.

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

Okay, and two lessons that go along with this, that this team also shared was: "Continuous training is important to ensure team members have what they need to develop and succeed in their role." This is kind of tied in, because you can start to see where training is needed, but also have that help you build a continuous training support cycle for team members, to make sure that they continue to develop and succeed in their role.

The other one that goes along with this is: "Having clear expectations with the team makes everything more efficient and smoother." This goes right in line with what we just talked about.

Okay, next lesson: "Transitions take time, plan accordingly." This is one that I resonated with, because our team is learning this so hard right now. Transitions take time, not just between people, but anytime you make a shift in the business, it's going to take longer than you think it's going to take.

That's because if you want to do it right, and if you want to do it well, then yes, you have to take the step and actually do the transition. But you have to plan for, and anticipate, all the barriers. And, think through what you're going to do, if and when those occur. It's never as simple as our brains want to make it.

You know, what's funny is, we will hold off on making transitions. Owners will do this all the time; humans will do this all the time. You'll hold off on making transitions, because in your brain, it's messier and bigger than it really needs to be. It's vague, there's no first second third step to follow, but when you sit down to map out the transition, then you can see the path.

But then your brain almost flips to; well, this actually is going to be easier than I thought. So, the pendulum swings the other way. What I'm learning for myself, and what I'm watching my clients learn, is that when you flip the pendulum the other way, it is in your best interest to bring it back to center. And know that, yeah, it's not as big of a deal, and as much of a stopping point, as what your brain was wanting to think.

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

You sit down, you map it out, and you map out the steps. Then, you feel good about the steps you need to take and you make a move. But there is this middle ground that you need to consider with transitions, which is looking at all of the barriers, and understanding that this is not going to go perfectly as planned.

It's just not, that's not how things work. You have to have a plan, so that you can move through as efficiently and as effectively as possible. But knowing that it's not going to move at a good clip the entire time, is a better way to plan. And that means looking at all the barriers that you should anticipate. What if timing is off? Padding certain sections of the project with time, so that you gave yourself some flex room and you're not cramming and hustling to get this transition done.

It felt like an important lesson here. If any of you are in the middle of a transition, I know that you are feeling what I'm saying. Because it's kind of part of the deal if you didn't really think through all of the barriers, anticipate those, and think about how you can lighten or eliminate those.

But if you have a transition coming up, then I just want to encourage you to take that extra step. Because once you map it out and you go for it, that's great. And, it's not going to go as planned. That's not how plans work; plans never go perfectly. So, give yourself space for the transition. Take time for that. Don't expect or be trying to squeeze results out of a transition too early. It's going to create a lot of stress and frustration for you and your team.

“Prioritizing ourselves, as individuals and as a leadership team, is crucial to the success of the firm.” This is very true. We talked about it, in this retreat. For them, it's like putting the oxygen mask on themselves first, and they have to take care of themselves. This is something that I talk with owners extensively about, is you have to make sure you are taken care of because you can't sustainably run a business, at the cost of you. It's not going to work.

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

Now, this becomes more and more and more true, the bigger that your firm gets. And you have other people that put their brains together with yours, as a leadership team and as a management team, to really push and drive the firm forward in the direction that you want to see it go.

If those individuals, that are contributing to this bigger vision kind of push, if they aren't taking care of themselves, then it will also be at the cost, of the effect, of them. You have to protect yourselves against that.

This isn't a flippant job; it requires a lot of energy. It requires a clear mind and strong focus. The only way that a human can show up, all-in, on a job with a clear mind and with a strong focus, and holding the vision we're all working towards at the forefront, is if they are taking care of themselves.

So, as individuals, as a part of a leadership team, but also as a leadership team itself, which means; you guys don't skip your meetings. You put your oxygen mask on first. You don't skip your meetings; you keep communication dialed for yourselves, as a leadership team.

When you start to notice that it's fraying for some reason, or it's suffering for some reason, you nip that in the bud. Because if you, as a leadership team, aren't taken care of, then it's going to be very difficult to take care of the rest of your team and to move in the direction of your goals and vision, in a way that you want to.

Each individual needs to take care of themselves so that they show up fully and all-in. And the leadership team needs to take care of itself, so that it shows up as fully and all-in as it needs to. And then, that trickles down. The effect on the rest of the firm, is really positive and helpful towards where you're going.

Yeah, towards where you're going, but it's not just about the goals. Towards where you're going, meaning you want a happy team, you want people who like to show up to work, you want communication to be great, you want the right systems and processes.

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

All of that will suffer, if the individuals who are running and driving things in the right direction and managing things, like it's at the cost of them. If they're a shell of themselves showing up, then this isn't going to work the way you want it to work.

So, I love that this was a lesson for them. "Prioritizing ourselves as individuals and as a team is crucial to the success of the firm."

"If something isn't working, remove it. You will thank yourself later." Amen. This is one that I feel like, the more time goes on, the more brave you get with pulling the plug on something, sooner rather than later. That can be tough. It's like you have to go through the lessons learned of keeping something around, whether it's an employee, or a process, or client, or whatever. Keeping something around longer than you should.

There's something in you, you just know you need to cut ties, but you have all these justifications; well, maybe I need to show up better for them. Well, I need to think through this differently. Well, I need to wait for X, Y and Z. Listen, you might be right. But most of the time, what happens is, that you let that play out and you realize in the end, it wasn't gonna work anyway.

So, this is something that really does come through experience. I don't expect anyone here to be like; oh, really? Well, then I'll just cut that off, now. If you feel inspired, and if you know, if this feels true to you, you are working on something that you know ultimately is probably not going to work out anyway, get rid of it. You will thank yourself later.

If you don't know that for sure, if you don't feel that that's true, that you are putting work in on something that isn't working, because you actually see that this could work and it's worth the investment of your time and resources, then do that. Because you're going to have to learn this for yourself.

But if you're listening to this, and you're like; dammit, that's me. I know I need to just pull the plug on this, even though I'm trying and I'm pouring

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

resources into it. I just need to be done, then do it. Let this lesson learned, being shared, be useful to you. You will thank yourself later.

The last one here is from this specific team: "Simplicity is profit. Prune the bonsai." I loved this; simplicity is profit, prune the bonsai. It's so easy, as your firm grows, to introduce complexity in an unnecessary way. I think we're all going to do that. That's part of growing, that's part of learning.

When you introduce that complexity into the business... And, complexity has to happen on some level. But once you introduce the complexity, always be looking for ways to simplify. Because it's like the first way that you are going to implement and create capacity in the business, for the growth or for a new practice area or whatever, you introduce something in and it helps. But it does create complexity.

Then you have to look, you have to prune it. Always look for a way to pare it down. Always look for ways to simplify once it gets implemented, because I think, most people think they're going to implement something new into the business, and then it's done. They don't keep looking at it until it's causing problems later.

So, this lesson; simplicity is profit, pruning the bonsai, you're always pruning, you're always looking for ways to simplify. If your attention is tuned to that, if that's something that you do, even if it's just quarterly, you give yourself the space to think through what needs to be simplified. How can we simplify? Really exercising your brain, for your firm, to think through what could you pare down? So, that it's an easier, more efficient, simpler way for the client, for you, for your team? You're going to see that in your bottom line.

Okay, and then one more. This is the last one from this specific firm. This is the owner saying this, "I am the problem. I am far more valuable than I think I am." What this is coming back to is, how spread thin the owner is in this firm. He's realizing he is the problem; he is in the way. He's far more valuable than he gives himself credit for. So, he stays plugged into things

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

that really don't make sense, when you think about how much his time is worth, and what his hands are in.

He is having to realize and step into the realization, that he is so much more valuable, his time is so much more valuable, than he gives himself credit for. And, that's a problem. It is holding the firm back in many ways. Now, there's been time that's passed since this, and he's making moves on this. So, it's all moving in the right direction.

He's been moving towards this for a long time. But it's just finally hitting him that in subtle ways, he is not valuing his own time, the way that it needs to be valued for the success of the firm. This is a big realization for him. I think all of us, as owners, have an opportunity to look at where are we not placing and seeing the value of what we bring to the firm, and our presence in the firm. That is something you have to think about.

There's a humbleness that can prevent this. And, this person I'm speaking of is, extremely humble, which is a great quality. But it will get in the way if you allow it to, and in this scenario, it was getting in the way. Because you know, it's easy for us to think we're willing to do anything to help our team, we're willing to show up and do X, Y, and Z. This is our firm, this is our baby, this is what we care about. We are we are a part of the team. We're going to keep in it, and stay in it, and be helpful.

But that can cause a problem, when you don't have the reverence, so to speak, that you need to have over your time. What you create and generate for this business, that can only come from you, is so valuable. And trust me, your firm needs more of it.

When you keep yourself, and your hands in the pot of things to be helpful to team members, etc. You are basically saying 'yes' to the team member, or 'yes' to the problem, 'yes' to the fire, 'yes, to the client, and 'no' to the entity that is the business. You could justify this all day long, but the more that you wake up to this, the more that you recognize it and realize it, the better off you'll be.

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

Because then, your brain will start hunting for solutions to be able to fix the things, the reasons that the hands need to be in the pot, instead of you contributing, to be helpful. I think all of us can probably learn from this one. Where are you the problem? Ask yourself that; where am I the problem, in terms of how I'm understanding and placing value on my time and myself?

It's not about not wanting to help your team, it's about finding a different way to do it, than you being the one to have your hands in the pot. That's a really important question to think through for yourself.

By the way, at different points in the journey, I have done this before for myself and my company. It was good, it was really good. It's sort of removed me from things I didn't need to have my hands in, but I was being helpful, etc.

But then the business grows, and you have to keep asking yourself this, you have to look at it again. Because as the business grows, your responsibility to the entity will shift and change. If you don't stay in tune with that, you're going to find yourself bumping up against ceilings that it's because of you.

You have to keep asking yourself this, periodically, and checking in about this so that you keep getting out of the way, and keep getting out of the way, and keep getting out the way. And by getting out of the way, you free yourself up to focus on things that matter for the entity. That matter for the business itself, and pushing it, and driving it, and fostering the growth in the direction that you want to see it.

Okay, almost done here. "Quantitative goals for employees are important." Now, this is another one where everybody will be like; well, yeah, totally. But okay, let's think about this. Do you all have them? Do you all have quantitative goals for employees?

This is one that sounds nice but is actually, there's a hump to get over to get people to do this. To get owners and leadership teams to do this. Because rolling this out, you do need to do it thoughtfully. You can't keep

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

changing the goals for employees. So, you do need to do it thoughtfully. Helping the employee see how they can impact certain things, so that they really pull those levers, that can be a wise move.

But I do see that it's something that's easy to put off, because you're not sure how to do it. This is something that *Velocity Work* touches on with people. When people bring this up, we help with this. This isn't a part of the Strategic Planning retreat.

But in the retreats, people start thinking about how they can pass along key numbers for others to be responsible for, other than just themselves. You usually see this about 500k-ish, that mark. For many firms, it depends on the practice area, for many firms who are starting to have to have other people take ownership over certain things. So, giving the goals for employees can be really important.

Another one: "High confront paired with thoughtfulness, delivers best results." I love this lesson. This isn't my favorite lesson of all, we're coming up on that, but this was a close second. High confront paired with thoughtfulness, delivers best results.

People are so afraid of confrontation. In my experience, the faster you can confront any situation that needs to be confronted, but it's paired with thoughtfulness, you will get the best results. Otherwise, things stew, they go unsaid, then there's miscommunication. The team member doesn't really understand. And, it's because you didn't want to confront the situation. Because you don't want to come off like, you know, an ass.

But really, truly, if you're thoughtful and if you're honest, but you don't let something go by, you just confront the situation, then you'll get better results. You'll move more quickly towards the things you want to move towards.

There's a book called *Radical Candor*. I love that book. It's really about this; it's about how to have high confront and do it in a way where you aren't an ass. To do it in a way where it's just honest. You're very thoughtful in your

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

delivery, but you don't shy away from confront. I mean, that book goes deep on many things. It's a brilliant book. But this is an example of something that they cover; you can't not bring something up when it's there, but you have to do it with thoughtfulness.

“Be open to outside perspectives of new team members, because they may reveal blind spots.” Really think about this for yourself. Sometimes we bring someone into our organization, and we are just myopically focused about how to help them get situated, in our way and our method of doing things. And really, their experience can be very valuable, to where holes are happening inside of your firm. Maybe inefficiencies that are happening.

Just be willing to hear outside perspectives of new team members, because it could open you up to a better way, maybe to a simpler way. As we talked about earlier; simplicity is profit. Pruning the bonsai. Maybe, someone with an outside perspective can really help you do that.

Also, I am an outside perspective to the firms that I work with. And, that's helpful. I know that and so I have to speak up when I see something, even if they decide to keep doing things the way they've always done them. I don't have an ego about them taking my advice.

But me, just saying, “Hey, have you ever thought about shifting it this way? Hey, why do you do it that way? It seems like it's not the most efficient way to do it, or effective way to do it.” Questioning it can be enough to help them open their eyes to a new opportunity for themselves, which is really great.

Okay. “Doing things in advance allows one to be more organized and prepared.” Yeah, this is planning. You know, my definition of planning is; making decisions ahead of time, period. Doing things in advance, making decisions in advance, it allows you to be much more organized, much more prepared, and not hustling. It gets you out of hustle, when you can do that.

Okay, you guys ready for the final lesson? I saved this one for last because I believe this so deeply. I haven't found the words, quite like this owner had,

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

to share and convey the importance of the core concept here. So, that's why it's my favorite. I think just the way that he phrased it summed it up so nicely. And truthfully, many of the lessons I've shared with you today are universal truth that finally, they got, with every cell of their being. Not just intellectually understood it, they actually got it.

“Words don't teach; experiences do.” So, every lesson learned that I've shared with you over the last three episodes, and every lesson learned podcasts I've done ever, ever, because we've done several of these in the past from clients and sprinters and etc. It is because of their experience.

You can't hear something and learn the lesson. You learn it because you are experiencing it. The words that this owner came up with to explain something that I feel like is at the crux of everything my company does, is why it pinged me so hard. But I really want every single listener to hear this for themselves, and think about it in your own world.

I want you to think about how maybe, you can see this for yourself because of your experience through what you're creating and what you're doing.

“Results are fragile. You can adapt to what your needs are, but you have to stay committed.” This firm owner had set some pretty lofty goals for this year. Before we started working together, his goals weren't that big. What I helped him see, when we were mapping everything out and planning for goals, is that actually, he just didn't know what was going to be inevitable in terms of growth.

So, the goals that he had in his mind, were too small. It wasn't really going to take focus, and it wasn't going to take him and leadership to think differently, it was just going to happen. Now, for him to take control and see the kind of growth that he wants to see, and I don't mean just numbers. I mean, how it feels to the firm, and the load of cases, and the type of people that he has in, etc. Like, there's all kinds of things and variables to think through, and that's why facilitation is so important.

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

You know, back then, when we were setting all these goals, it was mind blowing to him, and a bit intimidating, that the numbers that we were putting on the board, were the numbers we were putting on the board. I was fully confident and I hold that space for my clients. I'm always confident that they're going to hit them. The plan is to hit them in a certain amount of time. But it's no big deal, if they don't. I mean, you shoot for that, right?

But if we get to the end of the quarter or the end of the year, and it's not that, it's like; okay, next. And? We're still going to keep going towards it. To have him say, now that he is going towards these big goals, and he's well underway. I mean, this is, at the time, he stated this lesson, he's probably eight months into his journey, after we did his major strategic planning retreat.

So, eight months after that, and he is on track to hit those big numbers. It is not happening in the way that he thought. He's making all the moves he said he would make; he's implementing everything he said he would implement. They're doing such a fantastic job. And there have been barriers that they've bumped up against, and stuff that's been frustrating.

They've had to shift to adapt, based on what was happening and what they needed, but they never lost sight of what they're shooting for. Because of that, is the reason they're still on track. So, that's what I think he means when he says "results are fragile". They are, because he could easily have allowed his focus to shift elsewhere when he bumped up against those walls.

It is important not to do that. This is why I want everyone listening to this to hear me, when I say: If you have a goal that you are shooting for, and you are making moves towards that. And, you get caught up in something that feels like it just blew up in your face. Or, it's not going the way you wanted it to and it's frustrating. You can either decide how you're going to adapt to hit that goal, or you can kind of let it fall to the wayside. You can kind of let the goal slip out of focus.

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

You can change the goal to be smaller, you can do all these different things. But if the result that you wanted was that number; how can you stay committed to the number and keep moving, keep adapting towards it, instead of allowing it to crumble? Or, come down, or whatever? I just think it's so important.

This concept, I'm telling you, when you get this for yourself, everything will change. And to get this for yourself, you have to practice it. He's been practicing this for eight months. I mean, now it's been longer, but at the time, when he said this lesson; eight months he's been practicing holding this number and being committed to it no matter what.

Of course, we're not going to do this where he's going to be a shell of himself. That's not what we're doing here. But he's going to hold this vision for this number, no matter what. And it's almost just like; you know, okay, we put these plans in place. Hmm, that didn't work how I thought. I wonder how else I'm going to be hitting number? Because I'm going to be hitting that number. I'm committed to the number. So, how is this gonna come together? How else might we get this to work?

Having that commitment to adapt to the number, is the most important thing. It is the thing that people don't even realize that they stop doing, they just don't see it. It slips away, something else takes their focus. Listen, that's why results are fragile. I loved the way that he phrased this; results are fragile. You can adapt to what your needs are, but you must stay committed.

Committed to the result, yes, but committed to the work that will create the result; you're just committed over and over again. If recipe A didn't get you to the goal, you go to recipe B. You switch out some ingredients, you are committed to figuring out the recipe to get to your goal.

It's not going to be what you thought out of the gates, most likely, it rarely ever is. But you do your best guess. You write down; this is what I think needs to happen in order to achieve that goal. And, you go at it. And, you do, you execute, you honor your plan. Then, when you bump up against

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

something that either makes it so that you literally can't honor your plan, or you honored your plan and it didn't deliver what you wanted, alright, do not make that mean anything. You have to stay committed.

So, you change something out, you experiment here. But you stay committed, you don't take your foot off the gas, in terms of commitment towards the result that you're creating. This is one of those things that will change your life, not just your firm. It will change your life when you get this.

I think having accountability and support and coaching is really important for it, for myself, for all the people I work with. It creates more efficiency and it creates you getting to the results that you want it to, without delay. Because you don't have those periods where you took your foot off the gas for some reason. And, you don't really know why.

It just slipped out of focus because Plan A didn't work, and you don't feel like you always have the energy or effort. It's not top of mind to go sit down and think through; well, what is Plan B? What is Plan C? What else can I do? Holding that commitment requires focus. I think having a coach, or someone who's going to hold you accountable and be like; what now? Next. Come on. Hold yourself to a standard, hold yourself committed. I think that's important work.

I wanted to end on that one, because no matter what you do, you need a goal, you need something to work towards. You need a specific result that you're working towards, and it needs to be a number. When you line yourself up behind that number, and you make a plan to get there, and you execute on your plan, and you're committed to your plan, that is when these lessons can be learned.

If you don't hold a commitment to your plan, to create the results you want to create, you will not have lessons under your belt that you can use to carry forward. The smartest people on the planet are always reaching for the next rung on the ladder. They know it's not about the next rung, it's about the stretch. This is what this owner was talking about.

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

It's the stretch; you have to stay committed, you don't stop stretching, you don't stop stretching, you keep learning, you keep growing, you keep trying new things, and then there will be a point you hit the number. Then, that's when you'll be able to turn around and say, "Oh, this is how you hit that number." You can't ever just know exactly how to hit it, there's no blueprint for this.

This is about you learning enough and developing yourself enough to continue on the journey to hit that number, even when you don't know how. That requires a lot, a ton of growth and development for you, as the owner, and then of course, for your team. But it starts and stops with you.

If you don't have that attitude of growth and development and commitment towards the journey of getting to that number, commitment towards the stretch, then you'll spin a lot more than you need to. But you know, again, everybody's on their own journey. So, if you're kind of at that place where this doesn't appeal to you or it doesn't resonate with you, and spinning is kind of your game. Until you kind of get sick of yourself enough with that, that you decide to make a different call, you decide to ask more of yourself, then that's part of your journey too.

Because listen, I've been there, we've all been there. Where you're just not quite ready to say, "You know what? Let's go. What do I need to do? How do I need to think? How do I need to show up? How do I need to operate? So that all of this, this stretch, this commitment to the stretch, and commitment to the result I'm creating is just who I am, and what I do. So, the result is inevitable, because I'm not going to stop stretching."

That's so fun. But the people who are in it, they're stretching, they're developing themselves, and they love it. There's a joy in it not because it's all fun and joyous. Like, there's a lot of hard stuff that you hit. But that's what makes it real. It's what makes life worth living, is the stretch. The stretch is not always fun. But the people I work with are in the game. They are in the game, and that is fun.

Okay, everybody, have a really great week. I'll see you here next Tuesday.

#167: Lessons Learned from June Strategic Planning Retreats (Part 3)

Hey, you may not know this, but there's a free guide for a process I teach called, Monday Map/ Friday Wrap. If you go to velocitywork.com it's all yours. It's about how to plan your time and honor your plans. So that week over week, more work that moves the needle, is getting done in less time. Go to velocitywork.com to get your free copy.

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