



STRATEGIC PLANNING TEMPLATE FOR IN-HOUSE LEGAL TEAMS

GETTING STARTED

Planning can be hard work, so why not involve your team? Getting your team on board is great for team building and is perfect for ideation, design thinking processes and to develop strategic thinking skills. Before you get into the detail of planning, we suggest you start with a design thinking workshop. It is easier than you think if you follow these steps.

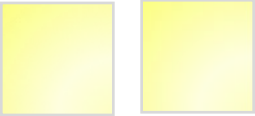
1. Be clear on your goals: what are you trying to achieve and the area that you want to focus on eg legal spend or ways of working
2. Prepare a structure and process for a good strategy design workshop – we have included a template on the following page
3. Dive deep into the problem, group the pain points into themes and then prioritise them
4. For each of the top themes, generate ideas for how to solve the pain point
5. Prioritise the best ideas
6. Articulate the strategy, where you are now, what your goals are and develop a plan for how to reach them
7. Visualise a roadmap
8. Get buy-in from stakeholders

STRATEGY DESIGN WORKSHOP



What is the goal *(be clear on what you are focusing on)*

Capture pain points, frustrations *(one point per post-it note)*

Two yellow sticky notes are shown at the top left of the workspace, representing where participants would capture their pain points and frustrations.

Group pain points into common themes and name them

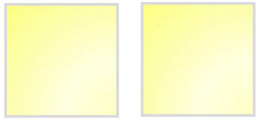
List the top 4 priorities from the themes identified – use the following template for each of these

STRATEGY DESIGN WORKSHOP

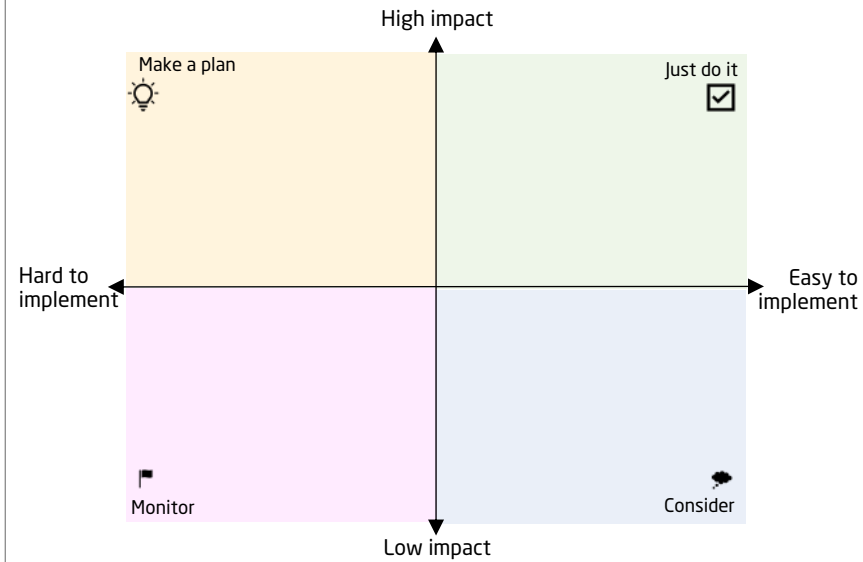
Theme:

Capture ideas on how to solve this pain point *(one point per post-it note)*

It is helpful to pose different questions: How would Google do it? How would [your competitor] do it? How would a start-up do it?



Map out ideas using this chart, or create your own variables



Prioritise the top 3 or 4 ideas

CURRENT STATE ANALYSIS



A SWOT analysis is a fast and effective way to explore where your legal team is now and identify insights and areas of opportunity

<p style="text-align: center;">Strengths</p> <p>E.g. Breadth of expertise and experience in our team</p>	<p style="text-align: center;">Weaknesses</p> <p>E.g. Resourcing recent litigation – bottleneck with in-house</p>
<p style="text-align: center;">Opportunities</p> <p>E.g. Technology solutions available could assist with efficiency</p>	<p style="text-align: center;">Threats</p> <p>E.g. Increase in regulatory issues Rate rises</p>

OBJECTIVES

Distil your thinking and succinctly capture how to leverage the opportunities, plan for threats and support the weaknesses

Goals

- What are you trying to achieve this Quarter/Year?

Initiatives

- What projects or initiatives will you need to achieve your goals?

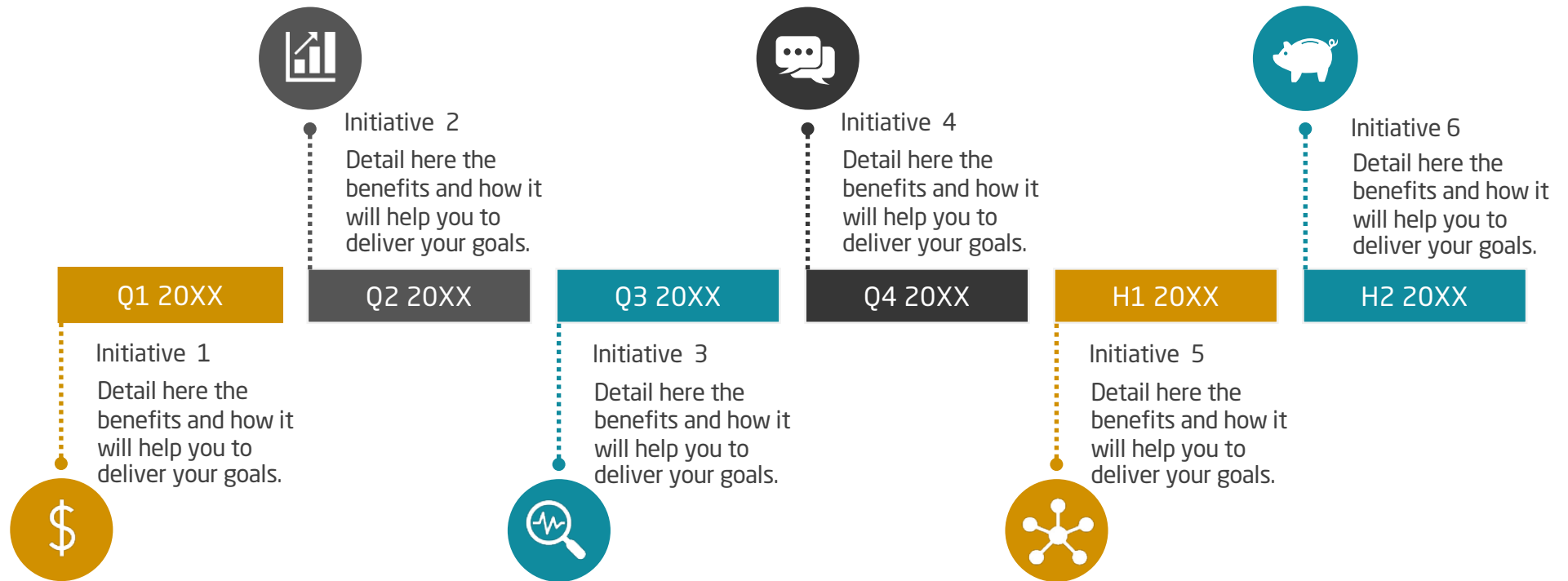
Resources

- Outline your resourcing requirements at a high level

Evaluation

- How will you know when you're successful? What will you measure / monitor?

VISUAL ROADMAP





Lawcadia[®]

Transforming legal