

# GP|Solo Law Trends & News

## Business Law

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### [Table of Contents](#)

## **How to Take Control of Your Practice by Creating Vision and Mission Statements**

*By Allison C. Shields*

Many solos and lawyers responsible for managing their firms report feeling out of control or overwhelmed. Even successful lawyers will admit that their practices grew almost by chance, rather than by design. They don't have a handle on how their clients are coming to them, or what their clients are really looking for. They aren't sure how to grow their practice, to take it in a new direction, to get better work or better clients. They never sat down and thought about exactly what they wanted their practice to be, but they tell me their practice isn't what they want it to be.

There is hope. Stop to take stock of where you are and where you want your practice to be in the future. After all, if you don't know where you're going, how are you going to get there?

The first step toward creating the practice that you want is by establishing the vision and mission, writing them down, and sharing them with everyone that works in your firm so that they are inspired by them.

The vision and mission statements are the touchstone for everything you undertake, from strategic planning, marketing, management and practice building to recruitment, hiring and performance evaluations. These two statements are important, concrete guides for the future of your practice. Once the vision and mission are written and digested, the rest of your business activities, including the management and marketing of your practice, have a direction.

With a mission statement, you have a guiding principle against which to measure each of its actions. You can begin to craft your practice in a more

purposeful way and create business plans which will bring the firm to its destination – the attainment of the firm’s vision.

## **What is a ‘vision?’**

The vision is the statement of what you are building. It describes the idea of your firm in a way that captures your passion for your business and inspires you. It is the picture of what the firm wants to *be* in three to five years. Although some advocate creating a vision with a much longer time-frame, with the pace of business today and the changing legal landscape, creating a shorter term vision can keep you inspired and won’t become obsolete before it is reached.

The vision should be specific and include items such as culture, the ‘feel’ and atmosphere of the firm, the intangibles that customers can expect, as well as the ‘harder’ or more tangible aspects of the business, such as number of clients, gross profits, number of employees, number of offices, number and types of practice areas, etc.

## **Crafting Your Vision Statement**

The vision describes your dream for your practice. Set no limits when initially exploring the vision statement – let yourself describe your vision in an expanded manner. It may help you see possibilities you might not otherwise have recognized. Spend some time thinking about it before editing down to what you think is realistic or achievable. But remember when editing not to edit out your passion – that which makes you enthusiastic about reaching your vision.

## **Questions to Consider When Creating a Vision Statement**

- Who is your ideal client?
- What are your financial goals for your practice?
- What will you or your firm be known for?
- What services will you provide your clients?
- What will your role be in the practice?
- Where do you practice?
- When will you need more space, different systems, more staff, more attorneys?
- Why are you practicing law?
- Why will your clients hire you rather than your competition?
- What will the culture of your practice be?
- What are your beliefs and values and how will they affect your practice?

## **What is a mission statement?**

The mission statement describes the firm's current purpose, identifies the firm's market, values and priorities. It illustrates how the firm intends to achieve its vision and how it goes about the practice of law every day. It answers the question why clients will hire you to represent them.

Spending the time creating the mission statement and obtaining input from others in the firm enhances 'buy in' from the firm, regardless of its size, and establishes a starting point for the firm's forward progress.

Your mission statement will also be useful for your clients – it will convey to clients and potential clients the essence of your firm and the manner in which you do business. The mission statement can be a powerful tool, both for strengthening the infrastructure of your business, and for attracting and keeping the clients you want.

## **Crafting Your Mission Statement**

The three keys to a mission statement are purpose, business and values.

### **Purpose**

What is the firm's core purpose? Your response to this question should be a concrete one, and it is truly the foundation of your whole practice, and especially your management and marketing plans. Spend some time thinking about why your firm was created, what need it seeks to fill. Why are you practicing law? What do you hope to accomplish? What are you committed to providing to your clients?

The purpose section of the mission statement should also provide some information about the firm's basic management philosophy and 'in-house' style – does the firm want to be a small, boutique law firm, a large business, a family atmosphere, corporate atmosphere, etc.

### **Business**

Your mission statement should also address the business of the firm – the firm's clients, practice areas and services provided. Keep in mind that if your firm has multiple practice areas, it might make sense to keep your overall firm mission statement more general and craft separate mission statements for the different practice areas.

Do you have or do you want to develop a niche practice? Who are the beneficiaries of your work? Who is your ideal client? What are their demographics? What are their problems or needs? What services do you provide to address those needs?

## **Values**

The values expressed in your mission statement emphasize what you are aiming for, what the firm's core priorities are - does the firm emphasize responsiveness over completeness? Do you emphasize alternative dispute resolution over litigation? Do you emphasize compassion versus aggression? What is most important to the firm, and how do you want to be known?

## **Set Yourself Apart**

To be effective, the mission statement should be unique to you and your practice and reflect your personality.

The problem with many law firm mission statements currently in existence is the same problem lawyers frequently have with their marketing – rather than focusing on who the target audience is, and what their problems are, the focus is only on the firm or lawyer – their education, their skills, etc. The mission statement, just like a good marketing message, must focus on the client – what their problems are, and how your firm solves their problems or meets their needs better or in a different way than your competition does. It's not about you, it's about them, and about being of service to them.

If you substitute the name any other law firm or lawyer that practices in your area of law in your mission statement, is it still true? If it is, your mission statement is too vague.

For example, “ To provide quality legal services and practical, effective solutions to individuals and businesses at a fair cost with a focus on client satisfaction ” is an ineffective and uninspiring mission statement. It doesn't convey a sense of the firm's uniqueness or culture. It doesn't communicate the kind of services the firm provides, to whom they are provided, or how. This mission statement sets forth the bare the minimum level of service which all clients expect their lawyers to provide – effective solutions at a fair price.

## **Tips for Writing Vision and Mission Statements**

- Be specific, but make sure that the mission statement doesn't become a strategic plan. The mission statement should be an enduring statement of the firm's identity, and should not contain goals and objectives. The specific goals, objectives and actions to be taken by the firm should be incorporated into a plan, but that should be separate from the mission statement.
- Use 'we' to emphasize the firm as a whole, and focus on the firm's culture and strategies.
- Make sure all of your employees can relate to the mission statement – that it inspires all employees to be their best and to work toward a common goal.
- Make it easy to understand – don't use 'lawyer-speak.' Remember, many of your employees are not lawyers, and most (if not all) of your clients are non-lawyers!
- A good mission statement fosters commitment, motivation, and inspiration.
- Seek input from all levels of the organization – from the file clerks, receptionists, secretaries, attorneys, paralegals, etc. This creates 'buy in' for everyone at the firm, makes them feel a part of the team, and provides different perspectives.
- After input is received, the mission statement can be written by an individual or a small committee composed of individuals sensitive to the entire firm's viewpoints, and it should reflect areas of consensus. But do not allow a large group to be involved in the actual writing of the vision and mission statements, as this approach often devolves into nitpicking about comma placement, etc. and accomplishes nothing.
- Set a deadline for completing the mission statement.
- Circulate a draft of the mission statement before it is finalized for review and comment.
- When reviewing the draft, ask yourself: Does this accurately reflect my understanding of the firm and its business? Can the partnership live up to this? Can the individual attorneys live up to it? Can our staff live up to it? Can we operate by this on a daily basis? Are we willing to measure

everything the firm does by this?

## **A Final Word About Implementation**

Writing vision and mission statements alone will not bring about change or reduce the feeling of being overwhelmed. To be effective, implementation is essential. Everything in the practice must be based upon and measured against the mission statement. If a client, a project, a charity event, a case, or a method of practicing is not in alignment with the firm's mission statement, the firm risks diluting the firm's identity and power.

Just as any good trial lawyer knows not to make promises in her opening statement that she can't keep, so every law firm should beware of crafting a mission statement which the firm is not prepared to act upon and enforce. Don't create expectations that you can't or won't live up to. If you don't believe your mission statement, why should your client? If the partnership doesn't believe it, why should your associates and staff?

In order to create effective and inspiring vision and mission statements, it is crucial to ensure that the firm leaders are in agreement. Do they all agree with the vision? Do the partners agree on the direction of the firm, the types of clients the firm does and will represent, and the manner in which the clients are serviced? Can all partners articulate and agree upon what sets your firm apart from the competition?

If you want to create a direction for the future of your practice, and a way of doing business that inspires you, your entire firm, and your clients, creating vision and mission statements are a good place to start. Once you have a clear direction, making real progress toward your goals is much easier, and reduces that feeling of being overwhelmed.

***Allison C. Shields, a former practicing attorney, helps solo practitioners and law firms reach their maximum potential by providing practice management and marketing strategies through coaching and consulting. You can learn more by visiting her blog at [www.legaleaseconsulting.com](http://www.legaleaseconsulting.com).***