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Growth plan

Reaching your firm's maximum potential with managed personal growth


Cooper

By Miles B. Cooper

The lawyer sat with the team member discussing the team member's growth plan. "This is the year you were planning to expand anatomy knowledge and lien resolution," said the lawyer. The two discussed ways to strengthen these areas, including looking into community college anatomy classes. They finished their discussion and the team member headed off to modify the growth plan's milestones.

What is a growth plan?

A growth plan is a professional development road map. Ideally, it should have a ten-year concept, a five-year goal, and a three-year plan, with annual milestones. For team members, milestone progress is discussed during the annual performance review as well as scheduled quarterly check-ins. For oneself, the milestones and quarterlies are addressed with a coach or by scheduling one's own meetings with an accountability partner.

Why develop plans? They help people reach their maximum potential. Some lucky few are fortunate enough to swing forward through life in an outwardly effortless arc, grabbing opportunity after opportunity like Tarzan with vines. Eighty-five percent of the world's workforce do not like their jobs, however, according to a 2019 Gallup poll. The best way to become a Tarzan and find workplace happiness is to determine what gives one joy and craft a plan to get there.

Building the plan

In *Radical Candor,* Kim Scott talks about superstars and rockstars. The former aim higher and higher and the latter prefer doing a darned fine job in their current roles. One is not better than another. Firms typically have both types. Both benefit from a plan. Institute building a growth plan as part of the first ninety days' probationary period. Assuming this is a new office process, make sure everyone can get on board, though. Outline the process and give everyone the opportunity. Provide an outline but do not tell them what to do. Their plans are theirs.

Building the plan requires initial strengths and abilities analysis. The Kolbe A Index (www.kolbe.com) and Clifton Strengths Assessment (www.gallup.com/cliftonstrengths) are short, inexpensive assessment tools. Unique Ability 2.0 (uniqueability.com/the-book/) provides a much more detailed self-discovery process. Combining these results helps one get a handle on the interests that bring one joy.

With these assessments in mind, determine one's concept for where one might want to be ten years from now, for example, "I want to run my own firm." Why a concept? Because lots can happen in ten years. Next comes a five-year goal, which can be a sentence, a paragraph, or bullet points. Continuing our example, "I will develop the finances, access to capital, referral relationships, trial experience, case strategy experience, and firm operations experience necessary to launch a firm." Then a three-year plan articulating how one will reach that five-year goal. Let's use the finance aspect of the goal for the next examples. "I will have 1.5 years' living expenses saved three years from today." Finally, the milestones. "I will perform a financial review next Friday to review and reduce expenses by 33%, calendar a monthly financial review to maintain the reduction and further save, and will have saved 1/3 of my goal one year from today. To the extent I face challenges I will devote time to researching frugality and consider a review with a CPA or other financial wellbeing consultant to reach my goal."

By building a plan with achievable milestones, one reaches the goal and can adjust for hiccups.

Using the plan

Using the plan requires an accountability partner. In a firm, the most likely candidate is a supervisor or a partner. Schedule quarterly check-ins and add the growth plan review to the annual performance review process. Discuss whether one is on track during the check-ins and modify milestones or plan action accordingly. In the annual review, make sure the growth plan still fits. Interests can change with life's circumstances, and plans should change accordingly.

Abandonment issues

Some folks might read this and worry about investing time, effort, and expense in peoples' growth, only to have those people leave. Surrender the illusion of control. People leave regardless. Epictetus said, "One cannot promote one's own highest good without at the same time necessarily promoting the good of others." Failing to invest in people fearing they will depart stunts a firm, its people, and the community. A growth plan further helps manage expectations and makes departures more predictable. If a superstar plans to be a partner and there's no partnership track, build the superstar's talents, make use of them to benefit the firm and the clients, and help that superstar eventually find a partnership elsewhere on managed terms. It allows superstar performance without fearing a team member will poach clients and cases when one's back is turned.

Outro

Back to our lawyer and team member. At the next quarterly check-in, they discussed progress. The team member was a few weeks into an anatomy class and was scheduled to attend an upcoming multi-hour lien seminar. Progress!

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