

Strategic Planning

Translating strategic priorities into measurable tactics
and operational plans

Strategic planning

The challenge for in-house teams

Many in-house legal teams acknowledge the importance of strategic planning, but admit that they are so busy 'putting out fires' on a daily basis and managing short term priorities that they simply don't have the time or resources to plan adequately for the future. Any planning that is done tends to focus on basic financial metrics and may lack well defined and measurable actions to support the organisation's wider strategic objectives.

Even with a structured strategic planning process in place, it can be challenging to translate an organisation's aspirational and often 'lofty' goals into tangible initiatives to support those goals and then to unlock the capacity needed to achieve them.

How can in-house teams prioritise work, make resourcing decisions or know that they are meeting stakeholder needs if they do not have a clear view of their purpose, vision and strategy?

Strategy in context

In order to ensure alignment, measure success and articulate the value the legal department is bringing to the business, it is imperative that in-house teams develop their departmental objectives and tactics within the context of the organisation's strategy and through engagement with key stakeholders.

Did you know?

Two-thirds of Legal Departments* do not:

- Have a department strategy which is aligned to their company strategy;
- Have a department strategy that includes well defined and measurable metrics; or
- Conduct annual legal operations planning that dovetails with legal strategy and budgeting.

*Results from the Legal Operations Health Check benchmark (contact us for a copy)



9 steps to developing your legal department strategy

- 1 Plan in context.**
Your department is not an island. Align your departmental strategies and operational plans to your organisation's strategic objectives.
- 2 Identify and prioritise stakeholders.**
Create a stakeholder map and link each stakeholder group to the strategic objectives to enable prioritisation.
- 3 Understand stakeholder values.**
Don't assume you know what the business needs. Engage with stakeholders and map their values in relation to the strategic objectives to inform your decision making.
- 4 Deprioritise less strategic work.**
This could be achieved through longer lead times on service levels, automation of low value asks, outsourcing of high volume or other resource intensive work or creating more self-service options.
- 5 Keep it simple and practical.**
Translate aspirational organisational objectives into measurable tactics and tangible actions for your department.
- 6 Create a strategy on a page.**
Summarise your strategy, objectives, actions, tactics and metrics on a page. This is a useful tool to ensure alignment and keep your department's objectives front of mind when making decisions and prioritising work.
- 7 Set KPIs and measure them.**
Strategic planning and objective setting should not be a 'tick box' exercise. Select KPIs to quantify and measure success on a regular basis. Use these results to evidence value-add to the business and position yourself as a strategic business partner.
- 8 Validate plans.**
Ensure your plans meet stakeholder needs and make sense in the context of your organisation's strategic objectives by validating them with stakeholders.
- 9 Review and revise.**
Your department's strategy and plans are not set in stone. Review them regularly against current and future organisational objectives and with reference to your KPIs.

Strategy on a page

To ensure alignment and drive decision making

Organisation	Strategic priorities The pillars of the organisation's strategy		Vision The picture of the future as seen by the organisation	Core Values Guiding principles of the organisation
Legal Department	Vision The picture of the future as seen by the department	Purpose Your reason to exist that aligns with long-term financial performance, provides a clear context for daily decision making, unifies and motivates your team.		
	Objectives Tangible goals to support delivery of the organisation's strategic priorities	Tactics Practical initiatives required to meet the objectives	Metrics To quantify and measure success of the tactics in meeting the objectives	

Operational planning

Translating strategic priorities into measurable tactics and tangible actions

Strategic Objective #1 – a building block to ensure the achievement of the organisation's strategy				
Team	What does the objective mean to us as a Legal Department?	Supporting Activity #1		Supporting Activity #2
		Action		Action
		Action		Action
Stakeholders	What should we do to meet stakeholder needs in relation to the objective?	Need #1	Need #2	Need #3
		Action	Action	Action
		Action	Action	Action
Processes and Tools	What processes and tools must we have in place to meet stakeholder needs and support the achievement of the objective?	Process #1	Process #2	
		Component	Component	
		Component	Component	
		Tool #1	Tool #2	
		Functionality	Functionality	
		Functionality	Functionality	
Skills and Resources	What skills and resources are required to meet stakeholder needs and support the achievement of the objective?	Internal Requirement		External Requirement
		Action		Action
		Action		Action

Next steps

How we can help you

Consulting projects may include:

Strategic Advisory Retainer	Providing strategic advice to support you across a diverse range of matters, when you need it most. This can be delivered via a hotline or through regular calls with you and your team, offering you a high degree of flexibility along with budget certainty.
Strategic Design	<p>Ensuring your legal department strategy is aligned to your organisation's strategic goals.</p> <p>Helping you develop targeted departmental sub-strategies such as a digital strategy, resourcing strategy or outsourcing strategy as well as guiding you through the process of establishing operational plans to support those strategies.</p>
Stakeholder Engagement	<p>Creating a stakeholder engagement plan.</p> <p>Conducting a stakeholder value mapping exercise or stakeholder satisfaction surveys.</p> <p>Facilitating workshops with stakeholders to agree service levels, inform and validate strategic and operational plans.</p> <p>Designing a Service Catalogue, aligned to your organisation's strategic objectives.</p>
Implementation	Assisting you in the implementation of operational plans through legal project management, the provision of secondees or the deployment of a multidisciplinary team.
KPIs	<p>Helping you determine which KPIs you should measure.</p> <p>Creating dashboards or report templates, using your existing systems or NRF Transform Data Analysts, factoring in your business requirements and stakeholder expectations.</p>
Change Management	Facilitating or supporting the change management process to build consensus with your team and stakeholders and embed new processes, tools and technologies. Often overlooked, effective change management can increase the likelihood of a successful outcome. This may include designing a change management roadmap, conducting workshops with impacted employees, helping you communicate the benefits of the change to the wider business or creating feedback mechanisms.

Top Tip!

“Know your purpose.”

Purpose-driven companies see higher market share gains and grow 3x faster* on average than their competitors, whilst achieving higher employee and customer satisfaction.

*Jim Stengel Co., "Purpose," accessed 4 December, 2020



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Tammy, a Legal Operations Consultant, was formerly the Group Company Secretary and Senior Legal Advisor for Zurich Insurance's Southern African operations. With 17 years experience within the professional services, corporate and start up environments, Tammy has extensive expertise in corporate governance, stakeholder management, strategy formulation, operational design and delivering business transformation projects.



NRF Transform is our global change and innovation programme. It aims to make how we deliver traditional services more effective and efficient, and to provide entirely new solutions to our client's most pressing business problems. It has over 150 staff in offices around the world, as well as 3 dedicated Hubs, and includes teams focusing on Applied Technology, Innovation, Legal Design, Legal Project Management, Legal Operations Consulting, Resource Management, and Commercial Management.

The Legal Operations Consulting Practice helps General Counsels and in-house legal teams optimise the delivery of legal services to their organisations, enabling them to go beyond managing legal risk and become a strategic business partner, supporting the wider objectives of the business.



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