COMMERCIAL MATURITY MATRIX

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MATURITY STAGE	Level 1 Ad Hoc No strategic direction or formal processes; efforts are reactive and inconsistent.	Level 2 Emerging Early structure and tools are emerging, but execution is uneven and mostly siloed.	Level 3 Forward-Leaning Growing alignment across departments with formal initiatives and improved tracking.	Level 4 Committed Strategy and systems are integrated across the firm, with leadership accountability and measurable progress.	Level 5 Optimized Firm-wide culture of strategic execution; data, tech, and talent fully aligned for scalable, sustainable growth.
Status of Strategic Plan	☐ No strategic plan exists, or it is outdated and ignored.	☐ Basic plan created; little alignment with current market realities.	☐ Strategic plan updated periodically; uneven execution across practices and industries.	☐ Strategic plan informed by formal client feedback and internal business leaders' input; driven by execution-focused leaders.	☐ Strategic plan is dynamic and adaptive; integrates relevant data points, competitive intelligence, feedback loops, and market trends. Execution driven by empowered leaders with clear accountability.
STRATEGIC GROWTH					
Profitability/Efficiency Optimization **Rates, costs, operational efficiencies**	☐ Little/no focus. Numerous Efficiency blind spots. Regular write-downs/write-offs result in profitability leakage.	☐ Inconsistent matter profitability tracking. Some write-down/write off controls emerging.	☐ Consistent guidelines enforce write down/off integrity. Matter and client profitability tracked and shared within management.	☐ Profitability analytics drive staffing, pricing, and strategy. Data informs shareholder positions.	☐ Fully integrated and transparent profitability management; cost efficiency, resourcing, and realization optimized through data.
Headcount Growth **M&A**	☐ Reactive hiring; no formal integration.	☐ Due diligence on laterals; informal onboarding.	☐ Acquisition and integration plans exist; integration inconsistent.	☐ Lateral hiring aligned with strategy; integration supported by PD, BD and practice-specific onboarding; at least 65% integration success over a 5+ year period.	☐ Proactive, data-driven growth; 80% integration success over a 5+ year period and trending upward.
Organic Growth **(BD, Client Development, Cross-Selling)**	☐ Partners expected to generate business individually without formal support.	☐ Some ad hoc marketing and BD training; few dedicated staff.	☐ Structured BD coaching and training; key lawyer support. Process for tracking BD activity in place.	☐ Consistent activity tracking in tandem with BD coaching; client team programs and shared targeting in place.	☐ Sophisticated BD engine; firm-wide frameworks; coaching-supported BD culture; lawyers held accountable to BD tracking and pursuit, CRM and data inform strategy.

NOTES

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MANAGEMENT TOOLS					
Compensation Alignment	☐ Based solely on originations and billable hours.	☐ Informal discussion of recognition for collaboration and BD efforts.	☐ Key non-billable contributions recognized through discretionary bonuses. No consistent formulaic approach.	☐ Compensation increasingly rewards BD, collaboration, and client expansion; tied to tracked behavioral metrics.	☐ Fully incentivizes growth behaviors, including non-billable activity like BD efforts, mentorship, practice profitability, and collaboration.
Operational Efficiency	☐ Operations are reactive, siloed, and heavily manual. Little attention to process design or support efficiency.	☐ Basic tools (e.g., time tracking, e-billing) introduced to address pain points. Early process documentation begins.	☐ Key workflows are standardized; project/task management tools adopted by staff. Some automation introduced (e.g., conflict checks, billing reminders).	☐ Operations aligned to firm strategy. Admin work is shifting away from partners to business professionals. Process improvement and resourcing are guided by KPIs (e.g., time to task completion, cost-to-serve).	☐ Core functions (billing, onboarding, scheduling, reporting) are streamlined and automated. Strategic professionals (COO, Pricing, KM, Lateral Integration) focus on value delivery. Dashboards guide real-time decisions. Partner time is protected for highest-value work.
Leadership Development	☐ Leadership roles based on tenure and seniority. No structured leadership training or coaching. Firms assumes good lawyers make good leaders.	☐ Reactive training and coaching for select leaders.	☐ Programs for emerging and existing leaders; some established "emerging leaders" programming.	☐ Leadership aligned with succession and strategy; leadership coaching used to level-set requisite skills.	☐ Leadership success tied to firm outcomes (succession, growth, resilience); coaching embedded as part of firm culture; high transition success rate.
Lawyer Retention	☐ No formal strategy beyond compensation and messaging.	☐ Basic retention efforts like hosted lunches and hybrid work schedules.	☐ Formal recruitment and proactive retention programs (e.g., mentorship).	☐ Talent strategy includes engagement metrics and development pathways. Regular feedback informs retention process improvement.	☐ Forward-thinking retention and engagement; feedback embedded in firm culture; retention measured and trending upward significantly; supported by HR business partners.
Professional Development	☐ No formal professional training aside from required CLE.	☐ Ad hoc skills training and voluntary BD workshops.	☐ Structured professional development and BD programs tailored by practice and career stage.	☐ Firm-wide competency models; BD and leadership skills tied to advancement; formal coaching program in place.	☐ Personalized development plans; BD, leadership, and other commercial capability coaching is the cultural norm; learning is continuous.

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MANAGEMENT TOOLS Technology & Innovation	☐ Tech-averse culture; fragmented systems; limited standardization; innovation reactive; minimal use of advanced tools, including AI.	☐ Isolated technology and AI tools adopted; limited integration; experimentation without governance; uneven execution across practices.	☐ Tech roadmap supports firm strategy; growing integration; inconsistent adoption; early gains from automation, data, and AI-enabled tools.	☐ Firm-wide integration; growing adoption; leadership accountability; client-facing solutions in play; measurable impact from data, automation, and AI.	☐ Innovation drives differentiation; advanced technology, data, and AI embedded across delivery and operations; talent strategy includes legal engineers and data specialists.
Pricing Strategy	☐ Ad hoc pricing dictated by individual partners. No effort to measure profitability leakage.	☐ Use of fixed fees/discounts inconsistently. Profitability leakage is occasionally discussed but remains unaddressed.	☐ Basic guidelines and AFAs used for key clients. Client interviews are beginning to inform strategic rate adjustments.	☐ Client interviews regularly inform fee adjustments; client behavior data informs rate strategy; AFA discussions are a part of matter intake.	☐ Strategic pricing aligned with client value; partner training on negotiation and AFAs; premium and AFA models optimized. AFAs make >30% of revenue.
Succession Planning	☐ Succession is rarely discussed. It is considered a sensitive and disruptive topic. No concrete link between strategy and leadership planning.	☐ Succession is occasionally mentioned as important, often in the context of pending retirements, with no formal advance planning protocols in place.	☐ Succession planning is integrated into long-term firm strategy and leadership goals. A mandatory retirement age is under consideration, but not enforced.	☐ Firm actively maps leadership gaps and succession risks across practices and markets; integrated risk scenario planning. Mandatory retirement formalized.	☐ Succession is a central part of strategic agility; reviewed and updated regularly to align with future growth and resilience, with firm-wide compliance.
Collaboration	☐ Individual partners may occasionally refer work, but there are no expectations, systems, or rewards. Collaboration depends entirely on personal trust.	☐ Leadership encourages cross-selling, but infrastructure is lacking. Efforts are inconsistent, untracked, and often fade without process, accountability, or incentives.	☐ Collaboration becomes a management priority. Cross-selling activity is tracked recognized, and rewarded. Cross-practice meetings surface opportunities, though adoption is uneven.	☐ Collaboration is baked into compensation, evaluations, and planning. Dedicated resources (BD staff, tech platforms, client growth programs) make collaboration easier. Successes are measured and celebrated.	☐ Collaboration is a non-negotiable cultural norm. Clients experience the firm as one integrated enterprise, with multi-partner, multi-practice solutions that increase revenue and client stickiness.

NOTES

THE 3Es OF CHANGE MANAGEMENT: ADVANCING A STRATEGIC INITIATIVE

1. **Identify one strategic initiative you are advancing.**

2. **What are you doing to...**

Educate (Create clarity through shared language, expectations, and understanding of why change matters.)

Empower (Drive action through accountability, coaching, and visibility into progress.)

Embed (Sustain behavior through systems, measurement, and reinforcement.)

3. **Rate your position of the 3Es on a scale of 1-5.**

Educate: ____________ **Empower:** ____________ **Embed:** ____________

4. **What is your next step? What is the deadline for this step?**

Deadline: __________________________

We'd be happy to walk through this exercise with other partners, executives, and leaders across the firm, individually or as a group.

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