

Strategic Review

Overview

The Strategic Review is a structured process designed to help partners define a clear, aligned direction for the firm. It provides a practical forum for partners to step back from day-to-day operations and agree what the firm is trying to achieve over the next three to five years, and how it will get there. This is not a theoretical strategy exercise. It is focused on creating clarity, alignment and a usable strategic direction that can guide decision-making across the firm.

The output is a clear articulation of what “good” looks like and the priorities required to achieve it.

Scope of Review

Firm Direction and Vision

What the firm is aiming to become over the next three to five years.

Succession and Ownership

Future ownership structure, succession planning and leadership continuity.

Market Positioning and Client Mix

Target clients, sectors and the type of work the firm wants to prioritise.

Technology and AI Direction

The role of technology, automation and AI in supporting the firm’s future model.

Profitability and Financial Structure

Desired profitability, margin expectations and financial resilience.

Risk and Future Proofing

Key risks facing the firm and how it positions itself for long-term sustainability.

Growth and Capacity

Approach to growth, including headcount, utilisation and partner capacity.

Method

Pre-Workshop Questionnaire

Each partner completes a confidential questionnaire to capture individual perspectives on the firm’s future direction, priorities and challenges.

This ensures all voices are heard and highlights areas of alignment and divergence.

Partner Strategy Workshop

A facilitated session with partners to explore key themes, challenge assumptions and build alignment.

The session focuses on defining what success looks like and the trade-offs required to achieve it.

Structured Discussion Areas

The workshop will typically cover:

- What “good” looks like in five years
- Market positioning and competitive advantage
- Profitability expectations and financial discipline
- Growth versus stability
- Succession and leadership
- Operational constraints
- Technology and AI opportunities
- Synthesis and Refinement

Outputs from the workshop are consolidated into a clear and structured strategic position.

Outputs

Each firm receives a concise, practical strategic summary including:

- A clear statement of strategic intent
- Defined vision of what success looks like over the next three to five years
- Agreed strategic priorities and focus areas
- Target client profile and market positioning
- High-level financial and profitability objectives
- View on growth, scale and capacity
- Succession and ownership considerations
- Technology and AI direction aligned to strategy

In addition, the firm receives:

- A summary of areas of alignment and divergence across partners
- Key strategic risks and constraints
- A prioritised set of next steps to move from strategy to execution

Outputs are designed to be usable, not theoretical, and to guide decision-making across the firm.

Outcome

The Strategic Review provides partners with clarity and alignment on the future direction of the firm.

It ensures that decisions around operations, pricing, technology and growth are guided by a shared understanding of what the firm is trying to achieve. It also creates a foundation for subsequent initiatives, including legal operations improvement, value-based pricing and AI adoption.

Pricing (Fixed Fee)

Small firms
(upto 20 employees)

\$7,795

Medium firms
(21–50 employees)

\$8825

Large firms
(51-100 employees)

\$9990

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