

Planning

Bringing strategic plans to life

Objective Manager Planning provides firms with the digital infrastructure to manage and execute strategic plans collaboratively and transparently.

Built for professional services, the intuitive platform supports business plans including:

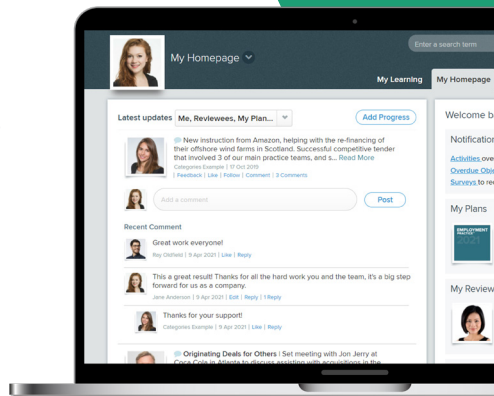
- Firm-wide
- Practice
- Partner
- Client
- Sector
- Business services

Drive real progress towards your strategic goals by aligning everyone's efforts to the firm's strategic objectives. Don't focus on time and tasks alone: drive behavioral changes and get your people thinking strategically and collaboratively, delivering big business impact along the way.

Give leaders instant visibility to your firm's strategic performance. Dynamic dashboards, built on Microsoft Power BI, deliver data easily segmented by sector, practice, location and role to drive your firms' strategy to success.

Key Features

- ✓ **Powerful search functionality** providing visibility across shared plans and key initiatives.
- ✓ **Streamlined planning processes** promoting SMART objectives aligned with the firms' goals.
- ✓ **Dynamic dashboards** make it easy to view and digest how the firm is performing against its strategic plan and objectives.
- ✓ **Customizable interface** displaying relevant activity to drive individual and team goals.
- ✓ **Configurable team structure** – establish client teams to ensure goals are aligned, optimizing the firm's value for the client.
- ✓ **Personalized activity feed** to easily follow plans, team members, and relevant activity, which helps partners and associates to advance their goals and career.



Objective Manager makes it easy to:

- Align your strategy firm-wide through shared objectives and plans
- Improve visibility and accountability for the firm's business development activities
- Remove silos and enable collaboration
- Unlock hidden expertise with Practice Group and Sector Plans
- Enhance your key client experience through a dedicated client plan with team goals
- Build and effectively manage attorney business plans

Plans and Outcomes



Firm-wide plans. Align everyone with the firms' strategic objectives to drive real progress towards goals and deliver big business impact.



Client Plans. Business development and relationship partners can make the most out of client initiatives and turn client feedback into actionable objectives, improving relationships.



Partner Plans. Make the annual partner planning process successful by engaging partners throughout the year.



Sector and Practice Plans. Achieve business unit growth plans and increase revenue by ensuring your teams are aligned and collaborating.

Client Reviews

" We customized our business plan in a way no other firm has done, to create a system where teams collaborate to ensure we are efficiently and effectively responding to client feedback."

Daniel P. Pulka
Chief Marketing Officer,
Troutman Pepper

" Objective Manager has been a resounding success for us. We have had 100% of existing partners with objectives signed off and shared with their fellow partners."

Krishna Anand
Head of Learning & Development,
Womble Bond Dickinson

" I recommend Objective Manager as a solution for streamlining the partner plan process."

Jill Weber
Chief Marketing Officer,
Stinson