How to Set Lawyer Goals: Strategies for Success

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With the rise of generative artificial intelligence (AI) solutions early last year, it's become clear that law firms are operating in a rapidly changing world. The past year has launched a storm of conversations about the role of AI in every workplace, including law firms, as well as a flurry of new tools and excitement.With that in mind, how can your law firm succeed in 2024? Solicitors who adapt can thrive will be best positioned to leverage these new technology tools effectively. Having a game plan—via clear, meaningful goals—gives you a benchmark from which you can adapt and adjust to be as successful as possible. As we look forward to 2024, it's the ideal time to think about what you want—and how you plan to achieve it—in the year to come. Still, setting career goals, or goals for your law firm's success, can be tricky. How specific should they be? What goals should you focus on when you're an experienced lawyer, and what are the best goals for new lawyers? How will you know when you reach a goal?The adage is true: What gets measured, gets managed. Start by setting SMART goals. Then measure, assess, and adapt them if necessary. In this guide, we'll show you how to set SMART lawyer goals for the year to come, so you can boost your professional development and help your firm succeed, with AI and beyond. We'll explain what it means to set SMART goals for lawyers, review what types of goals to consider for each stage of your legal career and give ideas for tools to help you measure and manage your lawyer goals.

What are SMART goals for lawyers?

Not all goals are created equal—some are *SMARTer* than others. Lawyer goals need to be clear and measurable to be effective, which is why SMART goals for lawyers are so important.Based on an approach by Peter Drucker—who also coined "what gets measured, gets managed"—SMART goals help lawyers with goal-setting to keep lawyers on track. SMART goals result in goals that are easier to track, monitor, and assess—in the short and long term. Whether regarding your career or any other area of your life, a SMART goal is:

Specific

Broad wishes like "make my law firm better" may be worthy dreams, but they aren't actionable, so they aren't goals. Goals must be specific and defined—something that can be accomplished. While "make my law firm better" is a dream, "increase law firm collection rates" is something that can be accomplished—which makes it a goal. If a goal is specific, you should be able to identify:

- Why you want to accomplish it

- How you will accomplish it (that is, what resources you'll need)
- Any potential roadblocks that could challenge you

Measurable

How will you know if you've accomplished your goal? Or how will you know how close or far you are from achieving it? A SMART goal for lawyers must be measurable. This means you can track and assess the goal's progress with quantifiable milestones. For example, if your goal is to increase firm collection rates, make it measurable by setting out to increase firm collection rates by a number—say 5%. Then, by tracking changes in collection rates, you'll know with certainty when you've reached the goal.

Achievable

Setting big goals is a worthy endeavour, but setting unrealistic and unattainable goals makes them demoralising and less meaningful. Using our example, if your goal is to increase firm collection rates by 2,000%, or adopt a brand new AI tool across your firm within a week, you aren't giving yourself a realistic, achievable framework. This erodes the goal's effectiveness. On the other hand, you don't want to set goals that are so easy that they're equally meaningless. For example, a goal to increase collection rates by 0.0005% may not be challenging enough to follow through. Consider both ends of the spectrum and set a goal that balances being challenging with being attainable.

Relevant

While, as we previously noted, career goals for lawyers—and goals for law firms—should be specific, they also need to tie in with your larger vision. Look at the goal of increasing firm collection rates by 5%: This goal is relevant to the larger goal of increasing firm revenue and business success. Setting a goal of learning to play the guitar may be a goal, but it's not relevant to your career—so it shouldn't be part of your career goal setting.

Time-bound

Set a time frame for each goal that you want to accomplish within. Set an honest, realistic deadline from the outset to boost your chances of success. Choosing an unrealistic time limit for your goal reduces its effectiveness. In our example, you could give your goal of increasing firm collection rates by 5% a time limit of one year. This way, at the end of 2024, you can assess, evaluate, and tweak your goal accordingly. As another example, you might want to look at decreasing your firm's lockup, a new metric covered in the 2023 *Legal Trends Report*.

Examples of SMART goals for solicitors

Think about the Key Performance Indicators (KPIs) for lawyers that are important to you and your firm. SMART goals for lawyers go hand-in-hand with KPIs for lawyers because of both value measurement, tracking, and accountability.For example, let's apply SMART goal setting to the client-acquisition KPI of the number of consultation appointments set. Here, our SMART goal could be "Setting four new client consultation appointments each month for 2024." Ask yourself:

- **Is it specific?** By defining a trackable achievement (setting a new client consultation appointment), this goal is specific.
- **Is it measurable?** Adding a number (four per month) to the goal makes it measurable—you either do or don't set four per month.
- **Is it achievable?** If you averaged two consultations per month in years past, then four per month is a challenging, but attainable goal. You would need to put in the effort to reach it, but it's not inconceivable.
- **Is it relevant?** This goal is related to the overall topic of client acquisition, which could bring a positive benefit to firm growth, revenues, and overall success—so it is relevant.
- **Is it time-bound?** By creating a time limit (four per month for the year), the goal is time-bound.

Learn about law firm KPIs you should measure.

More examples of SMART goals based on KPIs

You can use these as a starting point, and then customise them to you or your firm's specific situation:

- **Marketing KPI:** Email marketing performance.

SMART goal: To increase the firm's email newsletter click-through rate by 10% by the end of Q1.

- **Client-acquisition KPI:** Number of new cases opened.

SMART goal: To increase each lawyer at the firm's number of new cases opened by 5% by year-end.

- **Productivity KPI:** Number of billable hours.

SMART goal: To increase my billable hours by 10 hours each month in 2024.

Career goals for lawyers

The career goals and objectives of a lawyer are key at every stage of your legal career—though they may look a bit different depending on if you're a new lawyer or an experienced solicitor with many years of practice. A common mistake and misconception when it comes to setting lawyer goals at every stage? Hyper-focusing only on performance goals like getting good grades as a law student or making a lot of money as a lawyer. To be your most successful self and to keep you fulfilled and well-rounded as a lawyer and as a person, it's important to widen the scope of your career goal-setting. Focus on multiple aspects of your legal career—consider goals around improving your personal knowledge (like reading one inspirational book each month), business knowledge (like creating a law firm strategic plan), your clients' experience (like offering simple online intake forms to new clients), and personal wellness (like getting a full eight hours of sleep each weeknight).Whatever goals you decide to focus on this year, the key comes down to three factors:

1. Be clear about why you're pursuing a goal.
2. Measure your progress.
3. Stay accountable.

What are the career goals and objectives of a lawyer?

There's no one set of best career goals for lawyers. The best lawyer goals need to be personalised and customised to your unique situation and what's most important to you, taking into account factors like your practice area, the size of the firm you work at, and even your personal and family goals. For example, for some lawyers, the ultimate goal could be making partner, while others may strive to win a legal award. Others may want to start their own remote law firm. The variability is the advantage—and the challenge. To help, let's look at common goals for different stages of legal careers.

Goals for law graduates

If you're a recent or upcoming law graduate in 2024, your top priority is to likely get a job—and to get a job that you like.With this in mind, goals for a law graduate typically revolve around finding the right first legal job and getting your legal career started. This is the time to consider your why when setting goals—why do you want to be a lawyer, and what do you want your legal career to look like? Consider goals like finding a job that:

- Is at a firm with values that align with your values (For example, your goal could be to find a job at a firm that offers a certain amount of community outreach in their mission).

- Pays a certain threshold salary.
- Offers a level of work-life balance (For example, your goal could be to find a legal job that offers a certain number of weeks of paid time off or provides flexible hours to allow you to spend time with family).

Defining goals in these areas can simplify your job search and help focus it on a legal career path that is best suited to your unique strengths and weaknesses.

Goals for new lawyers

New lawyers are under a lot of pressure to develop their careers, so goals for new lawyers tend to be more focused on performance and on learning as much as you can as you grow your legal career. With this in mind, you may consider goals that focus more on:

- **Networking.** When you're a new lawyer, you want to soak up as much guidance as you can from more experienced lawyers. Your goal for this stage could be to find a mentor and connect with them monthly.
- **Performance.** Setting financial and performance-based goals—like goals focused on getting more clients and getting organised to get more done—can help you stay focused on growing your legal career.
- **Specialisation.** Now is a good time to create goals to develop your expertise, such as getting an article published in a law publication, or writing a series of blog posts on a legal topic.

Professional development goals for lawyers at any stage of practice

No matter where you are in your legal practice, it's essential to set professional development goals for lawyers to help you improve your practice and continue to grow. To identify what your goals should be for 2024, start with a clear-eyed assessment of your current situation. Notably, what's your current understanding of tech? Our guide to AI for lawyers can help get you up to speed.Honestly assess the different areas of your legal career in areas like fulfilment, financial success, business efficiency, client satisfaction, and your reputation. Also, look at your career situation, and assess areas like your mental health and work-life balance. What's working? What could use improvement?Focus on the areas that need work. Set SMART goals in these areas, stay accountable, and measure your progress—more on that next.

How to measure goals for your law firm and career

Measure, measure, measure: It may seem obvious, but it bears repeating because when it comes to lawyer goals, measurement is critical to success. While the best method of tracking may vary from person to person, tools and technology can help take the manual effort out of goal tracking and measurement—which makes you more likely to keep it up, while also giving you valuable data about your goal progress down the road. Here are a few useful tools to consider:

Law Firm Insights Dashboard

SMART goals for lawyers require measurement, and Clio Manage's Law Firm Performance Dashboard tracks firm performance metrics (such as billable hours and revenue) in one place.

Client Intake Insights software

If your goals for 2024 are centred around law firm growth and new clients, you need to be able to see and assess your firm's client intake process. Clio Grow's Client Intake Insights software offers in-depth client-intake and onboarding reporting from an easy-to-use dashboard, so you can track firm-related goals like referrals, new client types, and top-performing staff members.Measurement isn't just for career goals for lawyers—tracking your personal goals makes it easier to stay on top of your goals in all areas of your life, too. For measuring your personal goals, something as simple as reflecting in a journal regularly or having an accountability partner would be great. If you like the ease and data of using tech to track your personal goals, consider a personal goal-tracking app. Strides, for example, helps you track any habit you choose while providing a dashboard and progress reports for useful data and more accountability. You can also use wearable technology like personalised fitness trackers.

Conclusion

With technology and AI driving rapid change in the legal industry, it's important to set lawyer goals for the year if you want the next year to be as successful as possible. Setting career goals and objectives can help give you a playbook that you can refer to—to measure, adapt, and, ultimately, succeed. Without a clear plan, adapting to circumstances—whether it's the normal ebb and flow of business or an unexpected global pandemic—is more difficult.The key to successful lawyer goal-setting is to stay adaptable. Know why you want to pursue a goal, make it measurable, use tools to help you track your progress, and then watch and reassess as needed—based on your progress and what's happening in the changing world around you.

About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.