If You Don’t Think Creating a Vision is Important, Think Again

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Lynn P. Chard has been the Director of the Institute of Continuing Legal Education since July 1, 1993. She served as the Institute's Publications Director for thirteen years prior to becoming Director. A cum laude graduate of the University of Michigan Law School, Ms. Chard practiced law with the State Appellate Defender Office prior to joining the Institute of Continuing Legal Education (ICLE) in 1981.

As ICLE's Director, she has greatly expanded the continuing education opportunities for Michigan lawyers. Under her direction, ICLE added technology training for lawyers, developed "certificate of completion" programs in probate and estate planning and in family law, created "boot camp" training for new law firm associates, increased the number of major annual Institutes and, most recently, expanded to offer a Change Leadership Network with related products. She has led ICLE in developing extensive online educational resources. These include an online library of 51 books, continually updated and linked to primary law, and an educational service that includes hundreds of web casts, seminar materials, "how-to" kits, forms, and "top tips in 10 minutes".

She is active in the Association for Continuing Legal Education Administrators (ACLEA) and has held many positions including Director-at-Large, Publications Committee Chair, and editor of the ACLEA Newsletter. Ms. Chard has served on the Advisory Board of the CLE Journal and on the Planning Committee for the CLE Summit. She is a member of the American Society of Association Executives. She is a member of the State Bar of Michigan and serves on its Membership Services Committee and its Annual Meeting Committee.
‘If You Don’t Think Creating a Vision is Important, Think Again!'

By Lynn Chard, Director, ICLE, Ann Arbor, MI
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I. Who Needs to Know How to Draft a Vision Statement?

We most often hear about vision statements for an entire organization—it’s a word picture of where the organization will be 3-5 years from now. It serves as the guidepost for your strategic plan. Vision statements, however, are also very useful for managing any significant change—from major change projects at work to personal changes such as a new career or a house renovation. Change is most likely to happen when you have compelling reasons for the change and you draw a clear, exciting picture of what things will look like when you meet your goal and you’re wildly successful. Everyone who takes charge of change—in their personal life or in their work life—will benefit by honing their visioning skills.

II. What Makes a Good Vision Statement?

The purpose of vision statements for work projects is to give all participants an inspiring and vivid picture of aspirational, common goals. The best vision statements inspire and energize everyone in the organization—the leaders, the volunteers, the customers, and the staff. The vision is something you turn to for guidance as you work on your project or strategic initiative.

Here are the common elements of good vision statements:

- Inspiring
- Strategically sound
- Applies your (or your organization’s) values
- Starts with a memorable summary statement or powerful phrase that triggers the rest of the vision in the minds of those who read it and use it. (You may decide to write this last.)
- Written in the present tense and describes what your customers, contributors, sponsors and staff do, see, hear and say when you’ve reached your goals
- Passionate and emotional; it describes how your customers, contributors, sponsors and staff feel and think.
- Describes exactly what your organization’s structure, environment, staff, services, etc. look like. It’s uniquely “yours”.
- Takes a point of view--uses clear, unequivocal words.

In other words, a vision is a picture of how things look when a team achieves its goal(s) and everything is working well. It describes success and helps all who work on the project see what success looks like—for themselves, their organization, project, or strategy. If the project is a
personal one, an explicit vision helps you clarify what success really means to you. It helps you re-affirm or revise your original goals.

Please note that Internet searches for “good vision statements” often show you very short one sentence “visions”. I see these as the “memorable summary statement” referred to in the above list of elements for a good vision statement—not the statement itself. To me, a good vision statement has enough detail about the aspirational goals of the organization for the staff to use it to develop strategic initiatives and action plans to achieve these goals.

III. What Questions Help You Draft a Vision Statement?

Drafting a vision can start with a fast paced brainstorming session among a group of stakeholders. First describe the goal—the options are endless

- a new product line of multi-media e-books for teaching lawyers trial skills
- a new service designed to “hook” new lawyers and convert them into lifetime customers
- an online community of practice for your association that justifies an increase in member dues
- Education and testing resulting in “certification” when completed successfully
- a major new multi-disciplinary Institute that draws 500+ registrants

You get the idea—any major change initiative or major project benefits from a compelling vision. In Zingerman’s Guide to Giving Great Service by Ari Weinzweig, p 31, the author suggests this series of questions to ask yourself when your goal is a new service business:

- What would it look like?
- What would be happening?
- How big would the organization be?
- What would it be known for?
- What does the community say about it?
- What does the press say about you?
- How would people be dealing with each other inside the organization?
- Specifically, what would the service look like?
- How would this service be special?

Then, drill down deeper. “What does it look like when great service is happening in your organization?” How does your staff feel about service? How does the community talk about it? How does your industry recognize you for your service? How do the leaders live “service”? If you’re planning a new product, the questions might be: What are your customers saying about this product? How are they using it in their practices? What new skills did your staff acquire to create this product? How did you engage volunteer contributors with this product line and what inspired them to work on it? What new systems did you put in place to produce this product? What’s being said about it on social media?
With respect to the time frame for a vision, 3-5 years out is common. However, it doesn’t matter how far into the future you vision—the important point is to aim at a time when you will be successful and draw that picture. You need to know what success looks like. Then you can work backwards to decide the milestones required, over time, to get from the present to your goal(s).

To help drive change, a vision works best when it’s documented in writing. Otherwise, it’s too nebulous and easily changed or misinterpreted. It also needs to be communicated widely and effectively.

IV. Drafting the Vision Statement

Drafting vision statements can be intimidating. Don’t worry about perfection—just get started. If you need inspiration, turn to a group exercise to get yourself started. The questions stated earlier in this paper can be used in a brainstorming session with others. Make your visioning sessions fast paced and lively. Stick with brainstorming where you encourage all ideas—no assessments or judging. Just lots of ideas fast and furious. Have a scribe who writes them down on flip charts or electronic white boards. Often the wildest ideas trigger other ideas and pretty soon a great idea emerges. Other times, the leader of an organization or project will have the inspiration for the vision and produces a draft that then is reviewed and expanded, questioned and modified by a larger group. The important thing is to get started and to get it on paper. Then, fine tune it later to include all the elements of a good vision statement.

V. Examples of Good Vision Statements

It’s always helpful to see vision statements that have helped other organization’s achieve their goals. In Exhibits A-E you will see sample summary vision statements as well as full vision statements. Examples cover other industries as well as several from ICLE that apply to the CLE world.

VI. How Do You Communicate the Vision Effectively to Others?

One method, advocated by Ari Weinzweig of Zingerman’s Company of Businesses (ZCOB), and practiced by ICLE, is to engage a microcosm (focus group) of the staff, share the vision and ask them how to get the information out most effectively. A microcosm of the staff consists of:

- Small sampling
- New
- Here long time
- Works with management
- No management experience
- Younger
- Older
- Loves the organization
- Biggest cynical
They will tell you how others want to hear or learn about it. You will probably use a variety of means to communicate your vision for change—signs, staff newsletters or blogs, staff meetings, videos, meetings with supervisors, games or contests, etc.

At ICLE, one of the most effective practices we’ve used to communicate about major change projects is to first share a written vision with the staff several days before an all-staff meeting. At the meeting, a short presentation highlights the key elements of the vision, i.e. what we plan to do, and the guiding principles, i.e. how we plan to do it. Then we divide our staff of 50 into round table discussion groups of 6-8, often by their work groups. We ask each group to assume our change project is wildly successful and ask them what that looks like for their own work.

- What did you need to know to implement this change?
- What resources did you need?
- What new skills did you need to acquire?
- What worried you the most as you tackled this change?
- What helped you the most?
- What processes did you change to make this successful?
- What changed for customers? for contributors?
- What help did you extend to customers for this transition?
- What support did you give contributors for the transition?

Another approach for communicating the vision to the staff is to share it with them and then hold a large brainstorming session where you ask for their input:

For themselves:

- What changes do you see for your own work?
- What information will help you manage this change?
- What training do you anticipate you’ll need?
- Do you think any of your own processes will need to change?
- What will help you most in navigating this change?

For the organization:

- What processes will need to change?
- What will this mean for customer service?
- How will this impact our technology platforms?
- What new skills will we need to develop within the organization or outsource?
- What new opportunities will this change create?
VII. Implementation of the Vision

The typical process is to identify the strategies or projects that will accomplish the goals in the vision. Assign a single lead for each strategy or project. The strategy lead works with a team to create a shared vision of what success looks like for their strategic initiative. Next, they identify one-year objectives and assign the leads and their teams. They create a plan, define the deliverables, establish measures of success, set a timeline, make assignments and meet targets. Progress is reported, results are analyzed; successes celebrated. All of this activity, however, starts with an inspiring vision that draws a picture of success. For detailed guidance on this process, see Simple Lessons for Change Leaders and Teams, Communication, Collaboration, Project Management, by Karen R. Brown and Yvette L. Harms, Change Leadership Network, University of Michigan, Institute of Continuing Legal Education (2010)

VIII. Visions as Part of the Strategic Planning Process

A. Introduction

Since visions are most often used as part of an organization’s strategic planning process it’s helpful to see where visions fit within that process. If you try to develop a strategic plan without a vision, it’s like planning a trip without knowing your desired destination—it’s hard to know when you have arrived. Other times, an organization will have a one sentence “vision statement”—that may serve as an aspirational reminder, but it doesn’t do the job of drawing a word picture of the future that gets everyone on the same page.

B. Mission Statement vs. Vision Statement

Do not confuse a mission statement with a vision statement. Mission statements state the reason a business or organization exists. The mission of a CLE organization might be: “to lead in continuing education and practice help for [Michigan] lawyers” or “to help [Minnesota] lawyers practice faster, better, smarter.” The mission communicates why the organization exists to its staff, members and the public. It doesn’t change from year to year. Only major upheaval in your market place tends to cause a change in mission. Vision statements, on the other hand, speak to its future goals and are meant to inspire and direct its employees. Visions statements are often updated annually and always roll forward to look 3-5 years ahead.

B. Mission and Core Values

The core values for your organization generally unfold from a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis. The core values often are as timeless as the mission. They identify the values that set the organization apart from its competitors. For ICLE our core values are: partnership (with our customers, our contributors, our sponsors and staff); practical (advice and content on Michigan law); trustworthiness (of our content, education, services and policies); competency and growth (for our customers, contributors and staff) and innovation (to help our customers, contributors and staff thrive). Year after year, our strategic initiatives reflect
these values and usually fall into these three areas: Innovative, customer-driven services; Personalized communication with our users; and Development of a strong organization and staff. Each organization, once it really identifies what sets it apart and makes it successful, will have its own set of core values that probably won’t change much over the years.

C. Inspiring Vision

**Scope.** Vision statements are aspirational and set forth the organizations goals. They don’t outline the strategies or plans to achieving those goals. Instead, they enable employees to develop strategies to achieve the goals set forth in the vision. The vision statement helps all employees get on the same page and be more productive in reaching the goals.

**Responsibility.** The vision is the director’s responsibility. It’s much more detailed than a mission statement; it paints a clear picture of the organization five years (or more) into the future. It summarizes what the products, services, staff skills, infrastructure and partnering relationships will look like in three to five years. Any staff or board member reading the vision statement can see where the organization is headed. After gathering information from all stakeholders, the leader develops and communicates the vision—it’s distributed to new employees; it’s discussed with and updated by key managers each year; it’s reviewed annually at a board meeting and at an all staff retreat; and those leading strategies and objectives refer to it and reinforce it with their teams throughout the year. It gets off the shelf and into the culture of the organization. (See Exhibits A–E for a sample Vision Statement.

**Getting Started.** What if you’re the director, but aren’t talented at seeing a clear future vision for your organization? Perhaps you’re unduly intimidated about predicting the future. As Peter Drucker says, seeing the future is just a matter of looking out the window. What do you see happening today? Examples might be: client demands for fast turn-around in service increases; clients ask for set fees for pieces of legal work instead of hourly fees; specialization increases, organizations need to drastically lower overhead or limit employee compensation, clients seek more online self-help for legal problems, organizations discard their print libraries in favor of electronic research services, professionals turn to online communities of practice and web-based training instead of in-person classes, professionals rely more on mobile devices and less on office computers and phones for communication and access to resources, etc. The future isn’t really that difficult to see—it’s already all around you. Changes occur every day.

**Face the Facts.** The other key to developing a vision statement for your organization is to know the facts about your organization and the trends in your industry. And, don’t be afraid to face the cold, hard facts. Are your competitors gaining on you? If so, do you know why? Are your sales declining? Are your prices competitive with others in the field? Does your staff have today’s workplace skills such as strong database skills, web skills, programming skills, project management, collaboration, etc.? Are your key sources of income rising or falling? What’s driving these trends? An objective look at the trends already in play draws a pretty clear picture of the future.

**Write it Down.** It’s the director’s job to paint a positive picture of the future that incorporates future trends. It may be helpful to have a few sounding boards. Identify people on your executive board, partners, or staff members who think “big picture”. Review the organization’s SWOT
analysis with them and ask them how they envision the organization being successful five years from now. A detailed vision that draws a clear picture of the future is the foundation for your strategic plans. It deserves your time and attention. We have found that the vision is best if it’s organized around the core values you have identified for your organization. Every year, revisit it and roll it forward. Review and discuss it with your executive board—this is a great way to keep them involved in your strategic plans at a high level. You will be amazed at how much of the vision comes to fruition if you write it down and pursue it.

D. Strategies and Objectives

The vision describes where your organization wants to be in 3–5 years. Strategies are the broad plans for how to get there. Each strategy is a 2–3 year tactic that brings about a change to move you closer to reaching your vision. Part of the strategy is a baseline measure of where you started and the end measure of where you need to end.

Objectives are one-year chunks of work that step you closer to achieving a strategic goal. They unfold as the strategy is planned and become projects of their own. They can be simple or complex, depending on the complexity of the strategic change initiative. Shorter action plans often implement the objectives and complete the work of the strategic initiatives, thus implementing the goals set forth in an organization’s vision.

IX. Need Motivation to Get Started?

If you’re still not convinced that visioning will help you lead change, read the following blog, by Karen R. Brown, ICLE Administrative Director, for a nudge in the right direction.

Don’t Have a Vision for Your Organization? Why Wait?

We all move onward. The nature of change itself dictates that. Will we move with the rest? Take our chances? Try to keep up? Or will we lead?

Creating a vision for your organization allows you stability and growth in the face of internal and external changes that may seem to be out of your control. With a vision, you foresee these changes and use them to your advantage. Instead of dreading change, or allowing it to swamp you, be its master.

With a vision you:

- Call the shots
- Direct the action
- Control your future
- Cultivate loyal customers or members
- Get the repeat business you need to thrive

With such great benefits, why doesn’t every organization have a vision? Here are some of the justifications leaders have shared with us:

- I’m busy directing my organization, putting out fires, making the next short-term deal to bring in needed revenue. I don’t have time to go off and write a vision.
- Plan to do it. Know I should do it. Just haven’t gotten around to it.
- Not sure how to go about it. What if I don’t get it right? Am I putting my organization in jeopardy? Would it be a waste of time?
- There are so many different factions on my governing board. I can’t get two people to agree, much less my whole board. Everyone has their own vision. What will prevail?
- I tried it but it was too cumbersome and time consuming. It got put aside and was not brought up again.

If you are taking care of today, is that enough to secure your future? You may have tremendous status and market share. Remember, those are variables, not constants.

There is a compelling reason you should make it your business today to develop a vision for your organization: Without a plan to stay in front of change, the fast pace of change will render your organization obsolete. Consider the changes going on right now:

*Technology.* Technology is not only driving change it is making it easier for your competitors to eat your lunch. Through the power of technology they know more about your customers or members than you may think and they are eager to add them to their revenue stream. Are you using technology to stay closer to your customers or members than your competitors are? How is technology changing how your customers or members live and work? What will they need from you?

*Demographics.* Your customers or members are aging. What are their changing needs? Who will be your new customers or members in 10 years? What will they need from you? How will you communicate with them? Will you speak their language?
The Economy. How will your organization survive the prolonged economic slowdown? How are your customers or members coping with it? Will eliminating purchases from you be one of their cost-saving decisions? How will you make yourself indispensable to them? How will you help them thrive in the down economy?

You owe it to your organization, your clients, and yourself to create a vision for your success. It’s easier than you might be imagining. In fact, imagining is the heart of it.

Here’s the before, during, and after of creating a vision.

**Before**

Admit that you need a vision and set a deadline to have it completed. Put it on your calendar.

Be crystal clear about the mission of your organization. What is your purpose? Why do you exist?

Look out the window, as Peter Drucker recommends (*The Essential Drucker*). Assess what is already changing. Is your organization behind? Moving with the changes? Leading the changes?

Do an honest study of the strengths, weaknesses, opportunities and threats your organization possesses. This is referred to as a SWOT analysis. Share the results of your SWOT with your staff and governing board—better yet, involve them in identifying what they see as your strengths, weaknesses, opportunities and threats. They know your customers or members as well as or better than you do. They can help you make the connection between what your customers or members are facing and what opportunities this brings to you. Your customer/member needs will drive your innovation.

**During**

Make it fun. No need to lock yourself in a room until you emerge with perfection. Energize your staff and engage them in a visioning shout-out. Set the scene: It is 5 (or 10) years in the future. We are wildly successful. What are we doing as an organization? What does it look like? Who are our customers or members? Capture their remarks on a flip chart in the present tense—as if it was happening today.
Use these ideas as the core of the vision you shape for your organization. Again, it’s not about perfection. It’s about capturing the emotion and excitement of what you and your staff are imagining for your future.

As you read and review it, ask yourself: Is it doable? Does it ring true? Does it fulfill your mission? Is it challenging? Motivating?

**After**

Spread the word. Post it. Communicate it to your staff and governing board. Use it to

*Call the shots:* Your vision becomes an authoritative voice, the foundation for decision making.

*Direct the action:* Implementing the vision sets the strategic plan and action steps for the organization. Because staff were directly involved in creating the vision, they are likely to already be on board. You will find this shared understanding draws people together.

*Control your future:* Vision allows you to lead change, not be swamped by it. Name your opportunities and systematically pursue them.

*Cultivate loyal customers or members:* You will be addressing their needs because you will have looked out for their interests. Your loyalty to them will be returned.

*Get the repeat business you need to thrive:* If you are meeting your customers’ or members’ needs, you become indispensable to them.

Don’t have a vision? What are you waiting for?

If you would like detailed information and a handy checklist about SWOT analysis, visioning, and strategic planning download our free White Paper, *How to Take Your Strategic Plan Off the Shelf and Put It To Work* at [www.changeleadershipnetwork.org](http://www.changeleadershipnetwork.org)
Exhibit A
Sample Summary Vision Statements

Selected Summary Examples from http://topnonprofits.com

Feeding America: A hunger-free America (4 words)

Alzheimer’s Association: Our vision is a world without Alzheimer’s (7)

Habitat for Humanity: A world where everyone has a decent place to live. (10)

The Nature Conservancy: Our vision is to leave a sustainable world for future generations. (11)

Teach for America: One day, all children in this nation will have the opportunity to attain an excellent education. (16)

Kiva: We envision a world where all people – even in the most remote areas of the globe – hold the power to create opportunity for themselves and others. (26)

charity: water believes that we can end the water crisis in our lifetime by ensuring that every person on the planet has access to life’s most basic need — clean drinking water. (28)

Creative Commons: Our vision is nothing less than realizing the full potential of the Internet — universal access to research and education, full participation in culture — to drive a new era of development, growth, and productivity. (33)

Selected Summary Examples from www.changefactory.com

Microsoft: "There will be a personal computer on every desk running Microsoft software." [Short, simple, unequivocal, memorable and long term]

eHam.net: "To build the largest and most complete Amateur Radio community site on the Internet"
“Our restaurant is a place where people come to relax, have a good time, and enjoy a great meal. [The short memorable summary phrase]

From the moment our customers walk in the door, they are greeted by a warm atmosphere, subtle music, and friendly and courteous staff.

We cater to large groups that are out to have fun, as well as romantic dinners for people celebrating a special occasion. The restaurant is packed full of customers, and yet we efficiently avoid long delays while they are being seated and while their food is prepared.

The lighting, table arrangements, atmosphere, and decorations all encourage our customers to relax, let go of their concerns, and open up to new taste sensations. We provide exceptional service all night long.

When they are done, we take care of their check quickly and efficiently. They leave happy, satisfied, but not overly bloated or full. They leave with the desire of just one more bite of our wonderful food."
Exhibit C

Sample Vision for a Strategy at ICLE

Strategy 3: New Tiered Partnership

It is 2014. Continuing Legal Education from ICLE is lively and dynamic. Attorneys connect to ICLE resources through their “partnership” and enter a vibrant, successful learning community. Turning to ICLE as a trusted, useful work space has replaced thinking of ICLE as a place. On-the-spot updates focused on a practice area begin the day’s work. Engagement in an active learning community has replaced guesswork and tedious re-searching. Access to mentors has replaced uncertainty or, in some cases, trial and error. Skillful marketing has replaced waiting for clients to come knocking. Efficient, productive management has replaced routine and habit. Starting and ending the workday connected to the ICLE knowledge base has replaced shutting down the computer to run to a seminar or grabbing a book when heading to court. Interaction has replaced passive listening.

Lawyers’ careers, also, start with the ICLE connection and move upward, supported and boosted by ICLE’s competency based curriculum. Young lawyers, second career lawyers, those exploring new practice areas are connected with experts and mentors, who share their practical knowledge, and with peers who share their experiences, in a blend of continuous learning that fosters excellence.

ICLE Partners value their ICLE connection. Price is reasonable and rarely an obstacle to joining. ICLE Partners are “in the know”. They choose their own level of engagement based on their needs. They may be introduced through free content marketing delivered to their social media channels or as part of a new lawyer (or other ICLE customer group) “deal.” They may try the basic Partnership to keep up with what is new and what’s hot. They are delighted with the practical, smart, mobile friendly ICLE information flow and want more. They step up to ICLE’s premium service. It quickly becomes the bottom line for them in legal education and in the profitability of their practice. When they want a deep dive into a subject area through advanced training, a conference, or specialized bootcamp, they quickly search ICLE’s special offerings and sign up to reserve a spot, happy to receive generous discounts on the fee.

ICLE continues to be famous for innovation and high quality. Teams of market research, content, design, and technology experts collaborate seamlessly to deliver practical guidance when, where, and how it will best benefit the customer. Innovations in product and service bring change, but the customer is unaware that things have changed. She only realizes that things are better, faster, less expensive, easier, and more convenient. ICLE standards are so clear innovation happens effortlessly. Levels of quality are built into the process.

ICLE staff lawyers are subject matter experts. They have thought through and culled our resources so customers get instant, relevant results. They deliver the education experience that best fits the topic, aided by contributors, community members, instructional designers, editors,
producers, IT, and administrators to create practical, timely resources and ensure they are chunkable and reusable. ICLE has consistent ways to store and sort the chunks for instant recall, revision or expansion, and reuse. ICLE Partners are delighted to find the resources as easy to use and as engaging as those popular on YouTube. They are quick to signal their likes and dislikes.

When asked why they are ICLE Partners, attorneys respond, “I thought the former ICLE Partnership was great. Then ICLE moved me up to this new Partnership. Now, I’m more than a customer, I belong to a thriving, successful learning community. Great connections.”
Exhibit D

Sample Vision for a Strategic Initiative at ICLE

Strategy 7: New Education Models

It is 2016. Lifelong learning is recognized as a necessity and an expectation for all professionals, and ICLE has changed to meet this need. Our education is interactive, planned based on a curriculum, and concentrated in 10 core practice areas. Lawyers turn to us to achieve basic, intermediate or advanced levels of competence to meet their own career goals.

Our customers appreciate that we have used best practices for effective adult education, including the need to practice and receive feedback and to build on what the user already knows. New lawyers are attracted to our offerings because we factored in their educational preferences—the expectation of self-directed and self-scheduled learning, collaborating with a network of peers, accessing free resources from a world-wide community, and personalization of the learning experience.

ICLE recruits top experts to plan each course, deliver key lectures, develop video demonstrations, and create practice exercises and review questions. To help participants assess their mastery of the material, ICLE’s education usually includes self-testing at the end of every module and interactive review questions throughout the material. While these courses are often (and most economically) delivered online with feedback provided through ICLE’s online community, we also appreciate the value of in-person interaction. Participants may be asked to prepare for a live event by listening to a lecture online or reading materials and doing a quiz. Their in-person experience is then devoted to discussions and problem-solving among attendees, mentors and instructors.

To deliver this education, ICLE developed new skills and picked just the right educational software. While we have a dedicated staff member with instructional design skills, all our lawyers and editorial staff have a working knowledge of those principles. We work in teams of a lawyer, designer, editor, and technical person to create an educational offering. All the features in our educational software are easy to find, easy to use, and work together to deliver a coordinated educational experience. There are no “dead ends” in a user’s learning experience. The software feels familiar to them – it works with and has a “look and feel” similar to the software most small law offices use.

This education consistently gets top ratings from participants, and allows ICLE to have a truly statewide and even national reach. Because we have expanded the number of lawyers and related professionals we serve, and because we reuse and update most of our offerings, this approach is feasible. It is also feasible because of the rich collection on online resources we have already developed. Lawyers are enthusiastic. They tell us they always found ICLE’s seminars useful, but they never understood how much they could learn from an interactive program.
While each educational offering stands on its own, many lawyers value being able to track progress through ICLE’s curricula and trust ICLE to have identified the skills they need to progress in their practices. They no longer feel they have to go out of state to get a top-notch skill-building experience. And, the “flipped classroom” approach is particularly popular with firms that want to use ICLE’s education programs as the backbone of their own in-firm training and discussions, often coordinated with an in-person event.
ICLE’s 2016 Vision
Updated June 2012

ICLE Mission

The Institute of Continuing Legal Education delivers the best practical legal education and resources for Michigan lawyers and related professionals.

ICLE’s Core Values

**Partnership** with our customers, contributors, staff, and sponsors (*collaborative, connected, working together*)

**Practical** advice (*real world, customer-focused, “how-to”*)

**Trustworthy** content, policies, service (*accuracy, integrity, excellence*)

**Innovative**, to help our customers, staff and contributors thrive (*curiosity, growth, success, change*)

**Competency-focused** for customers, staff, and contributors (*education, success, growth, mentorship*)

“Your Partner in Practice” is ICLE’s slogan that reflects our brand and our core values.
ICLE’s Strategic Direction

ICLE’s strategic direction is to be a true “Partner in Practice,” transforming ICLE from discrete “products” to integrated content; “talking heads” to education; paper to electronic; search to social; working in silos to collaboration.

ICLE’s 2016 Vision

Summary

It is 2016. Most Michigan lawyers practice on their own or in small boutique law firms. New lawyers joining a firm are expected to “hit the ground running” while those in solo practice develop skills and networks on their own. Experienced lawyers work harder to retain clients and income. All are challenged to define their value to an increasingly demanding client base. They face competition both from non-lawyer professionals and web-based resources catering directly to the public.

Lawyers who succeed have become mobile, demanding resources and tools “on the go.” They are social, relying on networks and trusted sources. They are cost conscious and independent, investing in professional education and expecting the most in return. Whatever stage they are at in their careers, they find ICLE to be—as it always has been—their Partner in Practice, functioning like a trusted colleague who supports them by knowing the law, providing wisdom based on practical experience, and insights to help them through the “rough spots.”

Within ICLE, many things have changed, and some things will never change. ICLE has transformed its business and restructured its resources and services to be mobile, social, curriculum- and competency-based; providing vibrant learning communities and the best education experiences. ICLE staff work in a new way—dynamic, collaborative—to respond immediately with innovative solutions. Whatever the challenge or technical change, ICLE remains steadfast to its core values: to be trustworthy and reliable; to provide practical, real-world resources lawyers trust. Lawyers recognize this and turn first to ICLE for legal education and practice solutions.

ICLE has transformed its Content, Community, and Culture to help lawyers at each stage of their careers and build a great place to work.

Content

ICLE understands that lawyers need a variety of information, education, and practice tools. ICLE’s new Institute-wide content plan pulls this all together for 10 core practice areas. We understand the key topics in each area as well as the competencies lawyers must develop to practice at basic, intermediate, or advanced levels of practice in those areas. We have an overarching plan for each area that provides the framework for planning new offerings and organizing what we provide—whether the offerings are education, information resources, or practice tools. While we remain flexible, having such a plan allows us to meet customer needs, reduce duplication of offerings, and make our resources and education easy to find. The content
plan is supported by an Institute-wide quality system, which includes standards, processes and a curator to ensure that those standards are met.

In addition to the core practice areas, lawyers also turn to ICLE for reliable advice on running a successful law practice. They know ICLE “gets” that it’s never been harder to attract and keep clients, earn a decent living and keep up with rapid changes in technology. We also have expertise in project management, change leadership, and strategic planning available at changeleadershipnetwork.org.

**Education**

Informational seminars focus on law changes and hot topics. They are delivered just in time and in an accessible format. The rest of our education is curriculum-based, meeting professionals’ needs for lifelong learning and development. While each seminar is designed to stand on its own, lawyers can progress through a curriculum to achieve higher levels of competence in an area. More education is offered online, with video demonstrations, interactive features and self-testing.

Consistent with this plan, each core practice area also supports a major event, offering in-person attendance, interest-based tracks, and interactive sessions. While in-person attendance and networking are critical, these events include online features during the event and for on-demand access afterwards. They often offer the option of high-end small group seminars scheduled before or after the event.

New lawyers find this multi-faceted educational approach well suited to their learning preferences. Many more lawyers participate in skill-building through interactive online training. In-person events and training are offered when the in-person experience adds significant value. And, many lawyers participate in the certificate of completion programs leading to competencies and a credential that are widely valued.

Overall, Michigan lawyers think ICLE education is an excellent value. ICLE has managed to keep the cost of providing most of this education affordable by innovative uses of online education, applying best practices, and developing new non-legal skills. ICLE has in-house expertise in instructional design, online teaching, and testing, which complement strong IT and design skills. In addition, the curriculum and subject area plan allows us to focus our energies on delivering the most useful topics and the best educational experience.

**ICLE Partnership and New Business Model**

ICLE’s Partnership has been transformed into two tiers, designed to meet the needs of lawyers at every stage of their careers. At the Basic Partnership level, partners have access to numerous Updates/Hot Topics webcasts, Michigan Law Online, the ICLE lawyer community, Top Tips,
and short, accessible practice management advice. At the Premium level, Partners have all of these, plus the continually updated online book collection, How-To Kits, SCAO forms, and the Formbank. They receive deals on curriculum-based education and major events, which they purchase individually. They also receive discounts on print and online books. There is no separate Online Library.

As a result, ICLE’s annual gross revenue from courses has more than doubled and meets budgeted targets for net revenue. Part of this is due to increased participation by lawyers. New lawyer participation has tripled, particularly in the basic courses and certificate programs. New lawyers also praise ICLE’s attention to mentorship opportunities, which helps them make connections with established attorneys at ICLE events and in ICLE’s online communities. Large firm lawyers no longer think of ICLE courses as “mostly basic” or “designed for the small firm practice.” Instead, they look to ICLE for a range of options and report that ICLE’s training competes very favorably with expensive out-of-state CLE. Better yet, our curricula offer firms the backbone for their own in-house training, complete with competency standards and training modules.

**Community and Social Media**

ICLE has a variety of thriving online learning communities where lawyers with common interests willingly share practical know-how, interact socially, and generate a knowledge database from their online discussions. These communities include ICLE Partners, members of partnering State Bar Sections, ICLE staff, and the ICLE Executive Committee.

We incorporate online learning communities into ICLE’s services in a manner consistent with ICLE values. With communities, participants have the best of both worlds—access to vetted, expert content along with peer opinions and prompt, specific answers to questions. Communities help partners get more use out of their electronic content, allow “polls” of customer interest in topics and product ideas, help ICLE identify new speakers and authors, attract newer lawyers to our services, encourage mentoring connections, and increase awareness and sales of other ICLE products and services.

ICLE has also moved to social media and content marketing. ICLE staff members are impressed by how much benefit we obtain from incorporating “social” into everything that we do. Our participation in social networks lets us take the pulse of the legal community and include customers in designing and building new products and improving our services. Our connected customers learn about our latest products through their social networks when friends share a “like” for the product. Lawyers are enticed to register for an Institute after seeing a conversation with a speaker on our Facebook events page. If users have a problem with one of our products or services, we hear about it right away on social media and respond promptly for all to see. ICLE has done more than launch a social media presence – it has committed to the new connected way of doing business.
Culture
ICLE staff members are knowledge workers, able to work productively whether at ICLE’s building all the time, at both ICLE’s building and other locations, or almost all the time at a remote location. We can work with others easily at a distance or in the same room.

Changes come to ICLE products and services at a much quicker pace than in the past. Teams work together to create the resources ICLE delivers and to provide support for them. We work collaboratively rather than sequentially and our workspace supports this.

ICLE staff lawyers are subject matter experts who stay abreast of new law developments and participate in community discussions. They know the experts in the area and understand the issues practitioners face. They apply this knowledge to their work—whether updating a book, participating in community conversations, planning a short webcast, writing commentary for a form, developing interactive education, or identifying a new author or community champion.

ICLE lawyers deliver the education experience that best fits the topic, aided by contributors, community members, instructional designers, editors, producers, IT, and business data analysts, to create practical, timely resources. Our lawyers ensure the education is “chunkable” and reusable. We offer a range of delivery modes that connect with individual’s learning styles.

ICLE has a structured system for how we do things at ICLE. It’s supported by training, documented, and available to all. We rely on collaborative software to support our team- and project-based work style.

Introduction to ICLE begins during the hiring process. Introductory guides about ICLE’s values, business and staff approach are available on ICLE’s web site. Our orientation introduces the ICLE brand, who we are, who our customers are, how we work, and what we are expected to know. We’re introduced to ICLE’s professional development program and learn our responsibilities and our opportunities for professional growth.

Our professional development program is grounded in a philosophy that provides a commitment to staff for professional training and a guide for staff work as they work out their personal visions for their career paths:

ICLE’s staff development (learning) philosophy is that ICLE provides the opportunities and the culture to learn and to develop the potential of ICLE knowledge workers. Knowledge workers provide the desire and initiative to gain that learning and to apply it to their jobs. This promotes both the individual’s professional and personal development and ICLE’s business future. Both the application and the transfer of knowledge are rewarded in professional growth and promotional opportunities, consistent with our compensation philosophy.

ICLE’s communication philosophy is that our organization is committed to pursuing principles and ideas that promote collaborative communication. We strive to maintain a collaborative working environment.
We communicate as professional to professional. We foster an atmosphere of open communication. We participate in developing ICLE’s core structure, including the vision, strategic plan, products, policies, and practices. We are empowered to influence how ICLE functions through bottom line change and bottom line finances. We affect ICLE’s bottom line and therefore its success.

We live a culture of service: to each other; to our customers; to our community. We serve and are served; trust and are trusted; listen and are heard; achieve and are recognized. We know that we’ve built a great workplace and our staff confirms this.