

Applegate & Dillman Elder Law & Andrea Liebross Coaching

Creating a Runway to Freedom - Organizational Operating Systems

At a glance

Applegate & Dillman Elder Law helps clients protect the assets they've worked hard for, and the people they love, with advocacy and compassion.

Key metrics

In order to grow efficiently and effectively, we worked together to determine how many employees would be needed to handle an increase in caseload, and projected the team would grow by 4 in the next 3 years in order to the projected increase.

 **550**
Active Clients

 **17**
Employees



 Coaching and Keynotes

 www.andrealiebross.com

 Serving Clients Worldwide

CHALLENGES



Firm owner Lisa Dillman was in the beginning stages of succession planning. She recognized that her firm had young talent, but lacked clear direction, and she herself was too involved in the day to day operations. Lisa wanted to plan how best to grow, direct and move the firm into the future so that her people would not burn out and she could give herself more freedom to focus on client work.

SOLUTIONS



With the guidance of Andrea Liebross Coaching, Applegate and Dillman now has an operating system in place making the firm more efficient. Lisa has stepped into a visionary role, giving her more freedom and allowing others to lead.



**Future Focused
Planning**



**Putting Right
People in Right
Seats**



**Effective Meeting
Time**

BENEFITS



1

Capitalize on Opportunity; Effectively Deal with Problems

With new processes and a clear meeting structure in place, issues that arise are now quickly addressed and can easily be identified as an opportunity or an issue to be handled.

2

Clear Vision and Values

By establishing and cultivating this vision, A & D has found clarity of purpose so that every team member is pulling in the same direction. Clear values have made attracting the right talent and hiring much easier, and retention rates have increased.

3

Discipline and Accountability

From the top to bottom of A & D, every team member knows what they are responsible for and how they will be held accountable, improving the health and culture of the organization.