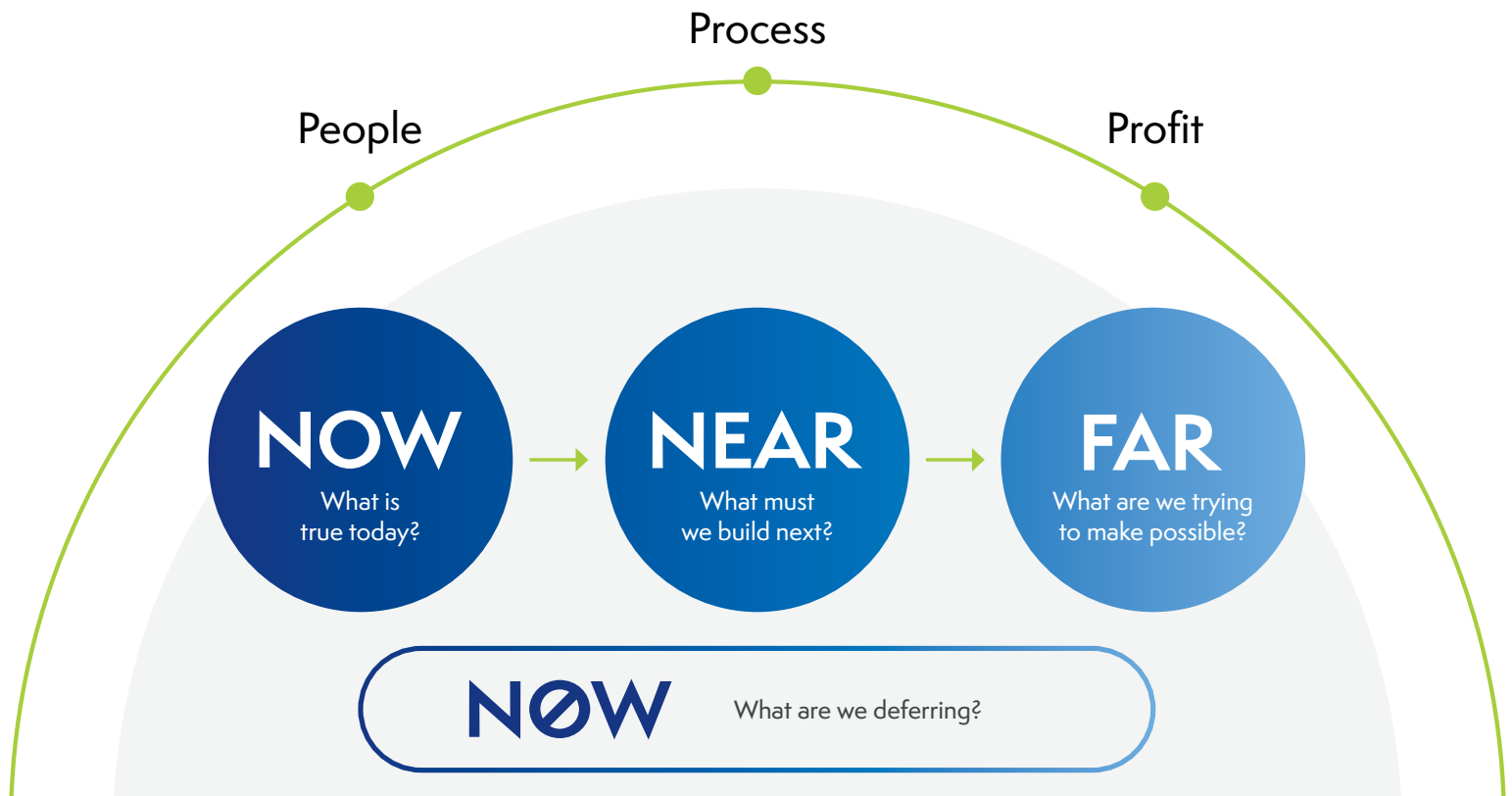


HOW TO BUILD Your NOW-NEAR-FAR Plan

NOW-NEAR-FAR is a simple way to organize the work so today's demands don't consume the future. Use it to get your arms around change, turn ambiguity into something you can operate, and create forward motion without losing control of today's work.

Navigating NOW-NEAR-FAR

Plan in this order: Start with NOW, define FAR, build NEAR and decide NOT NOW. Then test your plan through three lenses: People, Process and Profit.



Use these steps to build your own NOW-NEAR-FAR plan

01

CHOOSE ONE REAL CHALLENGE

Pick something you are genuinely responsible for, such as:

- | | | |
|---|--|--|
| ☐ Team capacity | ☐ Training | ☐ Workflow inconsistency |
| ☐ A technology implementation | ☐ Rework | ☐ Staffing or work allocation |
| ☐ Client or attorney expectations | ☐ A strategic objective from firm leadership | ☐ Developing new hires in the AI era |
| ☐ Bringing team members in at the start of a matter | ☐ In-office and remote expectations | ☐ Other (specify below) |

My challenge is:

02

START WITH NOW

02A What is true today?

Describe it as it is, not as it should be.

02B Protect and fix

What must be protected?

What is not working?

Where is the real friction?

02C Which lens matters most?

Pick one.

☐ **People**
Skill, will, clarity or decision rights

☐ **Process**
Handoffs, rework and the actual workflow

☐ **Profit**
What sits underneath the number



TIP: Get close to the work. Talk to people, sit beside them and observe the handoffs before you decide what is true.

03

DEFINE FAR

03A What are you trying to make possible?

Not a wish list.

A future state clear enough to give people direction.

03B What would meaningfully different look like?

Describe it in words your team would understand.

04

BUILD NEAR

Make the NEAR concrete enough to execute

Use measurable goals and SMART milestones rather than philosophical intentions.

04A What needs to be in evidence next?

One capability, behavior, workflow, milestone or result.

04B Make it measurable

Give it a date, an owner and a measure.

Illustrative example.

Too general:
Improve onboarding



Executable NEAR:

By June, every new paralegal completes intake unsupervised, with a defined error-rate target.

By ,
will
measured by



This may be the most valuable part of the exercise

NOT NOW creates capacity. Deciding what you will consciously defer is where the framework creates focus.

05A What will you consciously defer?

List what you are choosing not to pursue right now, and why.

05B When will you revisit it?

NOT NOW has to be a deliberate decision you revisit, or it quietly becomes never.

Revisit on

What would move it back into the plan?

Turn the plan into a first move

Write down one owner, one next action and one measure.

06A One owner

Who is accountable?

06B One next action

What happens first, and by when?

06C One measure

How will you know it moved?



TIP: You set the tone for whether change becomes workable or simply becomes another initiative.

Apply each horizon to People, Process and Profit

Read across a row to watch one lens move from NOW to NEAR to FAR. The prompts are a starting point.

	NOW	NEAR	FAR
PEOPLE Diagnose the people issue before choosing the solution.	<i>Is it skill, will or clarity?</i> 	<i>Set decision rights: tell me after, no need to tell me, talk to me first.</i> 	<i>What kind of team are you trying to create?</i>
PROCESS Get close to the actual work before changing or automating it.	<i>Where are people waiting, duplicating, re-entering, chasing or correcting?</i> 	<i>Box the human judgment. Then standardize, eliminate, support or automate.</i> 	<i>What does a workflow that protects human judgment look like?</i>
Profit Go underneath the number when it moves the wrong way.	<i>What is underneath the number? Rework, overtime, escalation, friction?</i> 	<i>Are we reducing cost, creating capacity, or both?</i> 	<i>What result will show People and Process are stronger?</i>



TIP: Profitability is often the visible outcome of something happening deeper in People or Process.

Look back along the measuring stick

Progress is the layer that shows movement across People, Process and Profit.

08A Six-month check-in

Look back and see the steps you have actually taken.

Check-in date

What can we do today that we couldn't do six months ago?

What has become reliable?

What has become simpler?

What has moved from NEAR into NOW?

What evidence shows we're closer to FAR?

08B Celebrate it

Progress creates energy.

Who and what will you recognize?

09A Your activation tools

Refresh your plan about every six months. Execution and communication are ongoing.

- ☐ Clear communication
- ☐ Defined expectations
- ☐ Tools and templates
- ☐ Recognition

- ☐ Visual roadmap
- ☐ Standing team conversations
- ☐ Milestones

FOUR QUESTIONS TO KEEP ASKING

NOW

What is true today?

NEAR

What must we build next?

FAR

What are we trying to make possible?

NØW

What are we deferring?

**You do not control change.
You can create clarity.**