



SHIFT 2025

Performance Dashboard

v. 1.01 [230927]



SHIFT 2025

Strategic Priorities



Increased participation

T1 : Target non-member in-house counsels

T2 : Launch MarCom campaign(s)



Improved engagement

T3 : Ensure tailored communication content



Appealing professional development opportunities

T4 : Support GCs in developing the careers of their teams

T5 : Optimise the ACCE Annual Conference



Successful policy & advocacy interventions

T6 : Promote the value of the profession



Financial sustainability

E1 : Reassess our current sponsorship offering

E2 : Increase sponsorship

E3 : Maintain AC sponsorship revenue

E4 : Ensure effective financial planning



All Others

E5 : Ensure effective board functioning

E6 : Increase # of engaged/empowered volunteers

E7 : Further raise trust & ACCE brand awareness





SHIFT 2025 | Key Themes

Id	Initiative Description	Performance		Vitals			Commentary	Board Member Accountable	Day-to-day Owner
		RAG	Weather	Priority	Target Date	Sufficient Resources			
T1 : Target non-member in-house counsels	I1 : Increase event participation (and membership sign-ups) from GC members and their teams.			Standard	Q2 2024		...	Yves	
T1 contd.	I2 : Increase event participation (and membership sign-ups) from legal team members with US-based work experience.			Standard	Q2 2024		...	Yves	
T2 : Launch MarCom campaign(s) to increase participation and engagement of new members	I3 : Identify target countries on which to focus resource and the campaign(s) so as to contribute to the estimated Chapter 2025 membership target of 3,650 members.			High	Q4 2023	Volunteers possibly required	Proposed Tier 1 countries: CH, DE, ES, FR, IT, & NL. Plan in process of being developed for identify marketing targets, market information and key points of interest in target countries. Dependent on volunteers and coordination with CRs.	Kimberly	tbd
T2 contd.	I4 : Devise and launch MarCom campaign for each Tier 1 country and a general campaign for Tier 2 countries which highlight ACCE's DEI values.			High	Q2 2024	Volunteers possibly required + eur16k for the campaigns	Plan to source and create 2 DEI communication campaigns (4 months each). Need to determine if we will have paid ads (the eur8k per campaign cost is an all-in price)	Kimberly	tbd
T2 contd.	I5 : Create multiple MarCom assets to offer an easy entry in to ACCE events and membership.			High	Q1 2024	Volunteers possibly required	Suggest clarifying I5 so that it is focused on professional development and the role which ACCE plays. Content marketing plan to be drafted.	Kimberly	tbd
T2 contd.	I6 : Create multiple MarCom assets promoting ACCE events as being a one-stop-shop for professional development and promote the assets to GCs and in-house counsel team leaders.			High	Q1 2024	Volunteers possibly required	Suggest clarifying I6 so that it is focused on the live events Promotional marketing plan to be drafted.	Kimberly	tbd











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T3: Ensure communication content is more tailored to member interests	I7: Collect sufficient profile data to allow for personalised member communications and content.			Standard	Q4 2024	Uncertain	Plan for profile collection in Q1 2024 drafted though is dependent on active support from HQ (database controllers), therefore budget unknown. Target success measures drafted - to be discussed at board.	Dave	Nicole (MCI)
T3 contd.	I8: Tailor online/email content to member interests and cease blanket messaging.			Standard	Q1 2025	Uncertain	Plan developed with discussions with HQ over limiting current shotgun approach in Europe and for delivering targeted content to be held in Q4 2023. Depends on degree of current DB profiling.	Dave	
T4: Support the GC in developing the careers of their teams	I9: Scale the impact of local events led by country reps.			High	Q4 2023	Yes	Plan for annual list of 'hot topics' and ground rules prepared with the aim that the output is published in Nov. 2023 and that it is supported by majority of CRs.	Jeremy	Neil Barnicoat
T4 contd.	I10: Facilitate experience sharing and co-learning between different corporate teams.			High	Q3 2024		The plan foresees an initial catalogue of topics and potential matches in Oct. 2023. Thereafter a one-page flyer to promote to legal departments will be prepared.	Jeremy	Neil Barnicoat
T5: Optimise the ACCE Annual Conference from a L&D perspective	I11: Remodel/rephrase ACCE's three learning pillars.			Standard	Q4 2023		...	Maria	
T5 contd.	I12: Entice more GCs to speak at the Annual Conference (AC) as part of the official programme.			Standard	Q1 2024	Yes	Ideated on high-level AC theme and topics. Have recruited the CAB members and conducted series of calls. Conference programme on track for mid-Nov 2023 completion.	Maria	




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T6: Promote the value of the profession, with a focus on in-house counsel legal privilege and on the European Convention on the Profession of Lawyer	I13: To campaign for more EU Member States to recognise the applicability of legal professional privilege (LPP) to in-house counsel.			Standard	Q4 2025	Yes	4-step plan proposed in MSI has been adopted with 3 success criteria identified. It is an ongoing process driven by the current Advocacy WG, backed-up by support from HQ. Annual financial expense of eur2.5k to be budgeted.	Maria	Javier
T6 contd.	I14: To campaign to have the in-house counsel profession recognised in the European Convention on the Profession of Lawyer.			Standard	Q4 2025	Yes	idem	Maria	Javier









SHIFT 2025 | Strategic Enablers

Id	Initiative Description	Performance		Vitals			Commentary	Board Member Accountable	Day-to-day Owner
		RAG	Weather	Priority	Target Date	Sufficient Resources			
E1: Reassess our current sponsorship offering	I15: Conduct annual review of current sponsorship data and offering			High	Q3 2023	Yes	2023 review and plan for 2024 completed. New Sponsor Offering to be approved by the Board. Prospectus to be sent to sponsors in early Oct 2023 so that 2024 budget can be secured.	Andreas	Genco (MCI)
E2: Increase sponsorship in a structured, sustainable way	I16: Design a roadmap for sponsor management and build long-term relationship with key sponsors.			High	Q2 2024	Yes	Target/Priority Sponsors List to be discussed at Board with list completion in Q4 2023.	Andreas	Genco (MCI)
E3: Maintain AC sponsorship revenue	I17: Enhance sponsors' AC experience and ROI.			High	Q4 2023	Yes	Top 20 AC sponsors identified; need to allocate 2 to each board member for them to have periodic check-ins starting 2-3 weeks after prospectus sent.	Andreas	Genco (MCI)
E4: Ensure effective financial planning	I18: Improve financial way of working			Standard	Q2 2024	Yes	First cash flow projection completed with quarterly updates planned. Work on new accounting provider pending potential ACCE relocation.	Mark	Mark
E5: Ensure effective board functioning and governance	I19: Enhance board oversight and effectiveness			Standard	Q2 2024		...	Dave	

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E6: Increase number of engaged and empowered volunteers	I20: Create Country Rep committees at country level			Standard	Q1 2024	Yes, note financial request	Plan and milestones developed, waiting for confirmation of Tier 1 & 2 countries in order to start. Request budget for 15 more CRs to attend at least 1 meeting in person (based on 5 Tier 1 countries) - to be discussed at board.	Jasprit	Yes (+ CRs)
E7: Further raise trust and ACCE brand awareness	I21: Create ACCE Ambassador role for past and outgoing leading volunteers			Standard	Q1 2025	Yes	Plan with milestones developed; note there is potential to undertake/complete this initiative earlier than scheduled - to be discussed at board.	Jasprit	Yes (+ CRs)

SHIFT 2025 | Legend

Retrospective			Prospective	
RAG	RAG Status Indicator	RAG Actions	Weather	Weather Status indicator
	<p>The initiative has deviated from plan.</p> <p>A red indicator denotes one or more of the following:</p> <ul style="list-style-type: none"> • Overspending by more than 10%. • A significant delay in the schedule. • A rise in quality issues. • Significant resource shortage. • Unsatisfied stakeholders 	The ACCE Board and MCI Management should analyse and find the reasons for the red status and take action to stop further deterioration.		<p>Thunder</p> <p>The initiative will face serious challenges and it is highly unlikely that the plan will be respected. This is an early warning indicator that this initiative is in serious trouble and direct intervention by the ACCE Board and MCI Management will be required.</p>
	<p>The initiative has some issues but will be completed successfully.</p> <p>An amber indication signifies one or more of the following:</p> <ul style="list-style-type: none"> • Considerable overspending of more than 5% compared to the budget. • A delay in the schedule. • Lack of resources 	The ACCE Board and MCI Management should keep an eye on amber initiative and control them to avoid falling into the red zone.		<p>Cloudy</p> <p>The initiative is progressing but there will definitely be challenges ahead which will negatively impact on performance. This is an early warning indicator that extra attention by the ACCE Board and MCI Management will be required.</p>
	<p>The initiative is proceeding as planned.</p> <p>A green signal indicates one or more of the following:</p> <p>The expenses are within budget The project is on schedule Quality is meeting expectations. No issues with resources Stakeholders are satisfied</p>	The ACCE Board and MCI Management watches while the Accountable leads completes the initiative, but they monitor data to ensure the initiative is on track		<p>Sunny with partial cloud</p> <p>This initiative is progressing well though there may be some challenges ahead. These challenges require some attention and effort but will not hinder progress.</p>
	<p>The initiative is yet to report.</p> <p>A dark grey signal indicates that the either the initiative is yet to start or that it is has started but reporting data is absent.</p>	The ACCE Board and MCI Management should make sure the initiative starts on time and/or that the accountable submits a timely update.		<p>Sunny</p> <p>The initiative is progressing well and no problems are foreseen.</p>