



**Clerion
Consultants**

| Article

Ready to Roadmap? Putting Your Clerion Insights Into Action

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From Insight to Impact

Congratulations - your Clerion Diagnostic has given you a comprehensive view of your business's legal and commercial landscape. You now know where your risks sit, which areas require urgent attention and where opportunities exist to strengthen your foundation.

The Diagnostic is not just a snapshot, it's the start of a structured plan that helps you act strategically, protect your business and ensure your growth plans can proceed with confidence.

Why Prioritisation Matters – Mapping a Course of Action for Growth

Every business has limited time, resources and energy. Even after a Diagnostic, it's not practical to tackle everything at once.

That's why Clerion uses a structured prioritisation system to help you decide what to do now, what to schedule and what to monitor.

Priorities are assessed along two dimensions:

- **Legal Risk:** How serious would the impact be if an issue isn't addressed?
- **Commercial Impact:** How much does addressing this issue support your business goals, growth plans or strategic objectives?

By combining these dimensions, we can create a clear action plan that balances protection and opportunity, so your legal strategy is not just about avoiding problems, but actively supporting your business's future.

Translating Findings Into Action: The Clerion Legal-Commercial Matrix

High	<p>Legal</p> <p>Top Legal Priority - Immediate attention needed to prevent serious legal issues. Example: a key client contract missing critical clauses.</p>	<p>Commercial</p> <p>Top Commercial Priority – High-impact actions supporting growth or strategic goals. Example: restructuring shareholder agreements ahead of an investment round.</p>
Low	<p>Legal</p> <p>Monitor Legal - Legal risks are minimal but still worth keeping an eye on. Example: minor updates to supplier contracts.</p>	<p>Commercial</p> <p>Opportunistic Commercial - Low legal risk but could unlock value. Example: implementing standard procedures to improve efficiency or client experience.</p>

This matrix ensures that the most urgent and high-impact matters are addressed first, while less critical items can be scheduled and managed efficiently.

ACTS: Four Ways to Engage

Your Legal Strategy Roadmap gives you a clear view of what to tackle next. Clerion offers four practical ways to turn insight into action:

- **Advisory:** Ongoing legal guidance to help you make confident decisions before issues arise. Think of it as having a trusted legal partner embedded in your team.
 - **Contracts:** Drafting, reviewing and updating agreements to protect your business, reduce risk and keep relationships strong.
 - **Transactions:** Support with investments, acquisitions, divestments or exit planning to ensure every transaction is smooth and strategically aligned.
 - **Strategy:** Annual or periodic reviews to keep your legal and commercial plans aligned as your business evolves, helping you stay on track for growth.
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Tailoring Your Roadmap: Working With Your Clerion Consultant

Your Legal Strategy Roadmap is a powerful tool, but it's not a one-size-fits-all solution. Your Clerion Consultant will work with you to determine what makes sense for your business right now, what can be scheduled for later and how to sequence actions in a way that fits your priorities and capacity.

You might not be able to take on every recommendation immediately - and that's fine.

Together, we can create a smart, phased plan that spans months or even years, ensuring your business evolves securely and strategically.

Where specialised expertise is required, our extensive network of partners allows us to match you with professionals who can best serve your needs, from HR and finance to industry-specific legal support. Throughout, we stay by your side, keeping your plan on track and making sure you get the support and business impact you need to grow confidently.

Next Steps

Your Clerion Consultant will now facilitate a roadmap meeting, where together you can discuss the best way to proceed, prioritise actions and decide how to leverage our network of specialist partners to support your business.