

The Value Drivers Scorecard™



Name: _____ Date: _____

Criteria	1	2	3	4	5	6	7	8	9	10	11	12	Score
Profitability	I feel constantly stressed around my cash flow and I don't think I'm paid enough for all the work I do.			I make a good living and am not stressed out about cash flow.			I pay myself a great base compensation. Additionally, I make a 35% profit margin as a shareholder.			More than 50% of my income is derived from profit centers (other people) in my firm and not from my personal production.			
Founder Dependency (ability to take time off)	I get in early, stay late. I work most weekends, and if I am not in the office working, I am on my phone or checking my email while out of the office.			I work a lot, but do get vacation and time off. When I am off, I do not check email or phone messages			I don't work weekends, I have a 4-day work week, and I average 4 weeks off. While I am off, I do not check email or phone messages. I am off.			I can take 175 days off and the firm works just fine, if not better, as opposed to when I am there. When I am off, I don't check email, do client work, or take phone calls.			
Team Value	I am constantly frustrated. I think I may have "adopted" my team. I feel like I am constantly cleaning their messes and amazed at their incompetence.			I have a good team. They have good skills and values. They want to make a difference for our clients.			Our team understands our strategic plan and are actively helping to implement it. Our weekly team meetings focus on cash flow, cases, and projects. Our team understands our workflows. Our team handles 90% of customer service issues before they arrive on my desk.			My team is self-managing. They are clear on their revenue targets and understand what is crucial to their performance. I constantly receive compliments from others about them.			
Management & Leadership Structure	What do you mean by "management?" If everyone would just leave me alone and let me do my work, then I would be happier.			I meet with my team weekly, and have a daily huddle to make sure work is getting out the door. I have an annual performance review process			I run a great team meeting. I am on top of our projects, case management, and calendaring. I feel that I can delegate exceptionally well. I have a great team.			I have an awesome team leader and a team of all stars! My team leader runs all team meetings, performance reviews, and projects. They are on top of cash flow, profitability and strategic calendaring.			
Technology Platforms	I have a wonderful paper system, print out emails to put them in client folders, and have a bunch of original files in filing cabinets.			We have a CRM/Case Management system, but my team is not using it effectively. I think I trust paper files more.			Our CRM/Case management system is working well. We are saving all communications (email, notes, correspondence) to client efiles.			We have a CRM/Case management system that I am confident in. All my team is trained and use the CRM. We are paperless, and I can email coded groups at any time I want.			
Process and Work Flows	I must tell everyone what to do and when to do it. They constantly ask "What should I do next?" We have an office procedure manual I created years ago, but we can't find it.			We have some documented checklists and workflows, which are kept in a central location. Occasionally, I must remind my team where they are and when to use them.			Our workflows and systems are great. My team uses them and looks for ways to improve them. If they've got a question, instead of interrupting me, they go there first.			We have a visual workflow process. When a new team member joins the firm, we start training them there. If there is a system or process breakdown, it is brought up immediately and the team works to improve the process.			
Marketing & Prospect Conversion Process	I do all marketing meetings, initial meetings and manage all marketing projects. My marketing is dependent on cash flow. When I don't have any, I market!			I have a brand, a great website, and an annual marketing calendar which allows us to plan when and how we are marketing. On a good week, I have at least three marketing contacts.			We have a marketing machine. We know our ideal client, ideal referral source, and our pricing is excellent. We have a great intake process that is less and less lawyer dependent. We experiment with non-lawyer initials.			We are a marketing and conversion machine. We can influence an uptick in new business whenever we want. Our conversion process is amazing, and at least 80% of our initials are done by non-lawyers.			
Client Base Value	I love, or at least like most of my clients, and have no resentment around pricing our services that I provide to them.			We have an "ideal client" and we market for them constantly. If they are not an ideal client, at the right price point, we pass on the case.			We proactively market to our existing and past clients, and we ask them for referrals. At least 50% of prospects come from client referrals.			We generate recurring revenue through a Lifetime Client Model. We can predict our renewal rate and our current clients refer our best new clients.			
My Mindset	I am a great lawyer. I want to be a great lawyer, and the lawyer that replaces me must be a great lawyer. The better technician you are, the more money you make!			I like being the hero of my story. I like that at my firm people treat me with deference and respect. It's good to be King/Queen of my fiefdom.			It's not about me. It is about growing a firm that is not dependent on me. I get that, but getting to the next level is easier said than done.			I focus every day on building a market dominant firm that is not dependent on me. I am focused on building a great team, marketing machine, and strong profits without me.			
Top Insights													Total