TRABA LEGAL

OUTSOURCING SCORECARD

Instructions: Rank your firm from 1 to 4 for each category.

CATEGORY	1	2	3	4	TOTAL
JOB DESCRIPTION AND PERFORMANCE SCORECARDS	I do not have written job descriptions or performance scorecards. I tend to delegate tasks as they come up to whomever is available.	We have written job descriptions for some positions, but they are several years old and haven't been updated. We do not use performance scorecards.	We have written job descriptions for each position that we update regularly. We do annual reviews for our team, but do not use performance scorecards.	We use written job descriptions and performance scorecards to evaluate our team. We review each team member at least every six months.	
TELEPHONE SYSTEM	I have a landline phone system in my office. I do not trust internet phones, and instead rely on wired phones.	I have a landline phone system. My client-facing team is required to give their personal cell number to clients for calls away from the office.	I have a landline phone system that allows calls to be transferred directly to a team members' cell phone.	I use a VOIP telephone system that can be used on a computer or a mobile device. My team can call and receive calls from wherever they are.	
PRACTICE MANAGEMENT SYSTEM	I use a paper-based tickler system attached to each individual client file with a rubber band. Files are shared with staff so they can do their work.	We have a server-based practice management system located in the office. Team members have to be physically located in the office to access the practice management system.	We have a server-based practice management system located in the office. We have enabled virtual access through a VPN, which some team members use to work remotely.	We have a cloud-based practice management system. Team members can work from anywhere, and can access the information they need simultaneously.	
CLIENT FILES	All my client files are paper. I do not scan documents unless absolutely necessary, and do not own a scanner.	All my client files are paper, and we only scan files if required or in certain situations.	We scan every document, and maintain both paper files and electronic files. Sometimes the paper files and electronic files don't match each other.	All client files are electronic, except for a limited number of documents. The entire team has access to client files as necessary for their jobs.	
REMOTE & VIRTUAL WORK	I work in the office and I expect my team to as well. I expect my team to be physically available to me so I can delegate tasks to them.	Only attorneys can work remotely, and it is a privilege they earn after an arbitrary period of time of working for me. Staff cannot work remotely.	My team may work remotely only in certain specific situations, such as being sick or on leave. Otherwise, I do not encourage or allow remote work.	All my team can work remotely, with only a few limited exceptions. We encourage remote work and look for ways to allow it as much as possible.	
TEAM TRAINING	I don't have a formal training program or the time to teach my team. A good team member will learn as they go. It's up to each team member to seek out knowledge.	A former employee documented some processes. She was a real go-getter, and I don't know why she left. Those processes are available, if I can find them.	We have a training manual. Only attorneys and senior staff can update it. Because everyone is so busy, it only gets updated every 2 years or so.	We have a training process that includes videos, FAQs, and a knowledge base. Each new hire has access to a specific curriculum for their position.	
PROCESS & WORKFLOWS	I don't have any systems, checklists or processes to handle workflow and customer service. We don't have or don't use an office procedure manual.	We have some documented checklists and workflows, which are kept in a central location. 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 have a question about a task, they always go there first.	We have a visual workflow process. System or process breakdowns are dealt with immediately, and the team constantly works to improve our process.	
TEAM MEETINGS	I don't have time for meetings because they are a waste of time. If someone needs to know something, they can ask me or another employee.	We have team meetings on an ad hoc basis, only when needed or if there is an emergency. We never have an agenda, as I prefer to wing it.	We have a scheduled weekly meeting with an agenda, but we often skip it because we're all too busy. We don't have any other meetings.	We have a regular cadence of meetings, on a daily, weekly, quarterly, and annual basis. Each meeting has its own agenda and purpose.	
TECHNOLOGY	I rely on paper. My assistant uses WordPerfect 5.1, which is the first (and last) technology I ever learned. Our computers aren't networked.	We have a server that is only accessible in the office. My computers are at least 5 years old, and are only replaced when they break down.	We have a networked server. Some team members can work remotely in certain specific situations. I generally do not encourage or allow remote work.	Our technology is cloud-based. We leverage technology to better serve our clients and give us a competitive advantage.	
TEAM COMMUNICATION	If I need to communicate with my team, I typically yell for them from my office, and I expect them to come to me.	We use printed memos about client matters that we circulate among our team. We also document file action in the server-based practice management system.	We use an instant messaging app to communicate internally about cases. However, this program does not integrate with our practice management system.	We use an instant messaging app integrated with our practice management system to communicate internally about cases. We also use phone, email, Zoom, and screen sharing.	

Total out of 40 ▶