

#### About the Author

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This is Frank's 18th book. His other seventeen books include - Go Motivate Yourself, From Law School to Litigator, The Associates' Handbook, Attorney Marketing 101, Training Your Law Firm Associates, SLDO Strategic Planning Manual, Future of Law, Social Media Musings – My Reflections on the Practice and Life, The Practice and Process of Law – Checklists for Every Occasion, Be Your Own Life Coach, LinkedIn for Lawyers, Getting Published for Lawyers, Social Media Musings – Part 2, Confessions of a Latino Lawyer, The Associate Whisperer, Social Media Musings – Part 3 and You're Hired. He has written over 400 articles and has edited five books - The Defense Speaks, The Trial Tactics Defense Manual, The Deposition Manual, Leadership for Lawyers and The Public Speaking Manual. Please follow him on LinkedIn, where he posts daily and has over 52,000 followers, or feel free to e-mail him at framos@cspalaw.com.

#### **DEDICATION**

#### To Ana

You have always been the answer to every one of my questions

To David and Michael
Never abandon your curiosity

#### Prolouge

This book is unlike my other books in that the body of this book contains no declarative sentences, only questions. This book is comprised entirely of questions for lawyers and their firms to ask to improve themselves. I don't think we spend enough time asking ourselves questions. It is in asking ourselves questions, lots and lots of questions, that we discover our purpose, our direction and our destiny. I hope you find these questions valuable for your careers and your firms.

#### Acknowledgements

To Rachel Rosenberg, thanks for organizing my random thoughts into this book. Without your help, this book wouldn't exist. We'll have to do it again in a few months.

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#### **My Career**

IU CO	llege, how did you imagine your career?
In lav	v school, how did you imagine your career?
Now,	how do you imagine the rest of your career?
Are y	ou satisfied with your current career?
If yes	s, why? If not, why not?
What	are you most satisfied about with your career? Why?

	re you least satisfied about with your career? Why?	
What wo	ould you change about your career? Why?	
Do you e	enjoy your current employer? If yes, why? If no, why not?	
What do	o you enjoy most about your current job? Why?	
What do	o you enjoy least about your current job? Why?	
Where c	do you see your career in five years? Are you on track? Why?	

Whe	ere do you see yourself in ten years? Are you on track? Why?	
At th	ne end of your career, where do you hope to be? Why?	
Are y	you satisfied with your compensation? If not, why?	
If you	ou're not satisfied with your compensation, what are you doing about it?	
Are y	you satisfied with your employer's culture? If not, why?	
If you	ou're not satisfied with your employer's culture, what are you doing to impr	rove it?

ou see yourself with your current employer in 5 years? 10? 15?
u don't see yourself with your current employer in the future, what are you doing abou
y proactive are you about directing your career? at are you actively doing to direct your career?
ou believe in the statement "only I am responsible for my career." Why or why not?
at are your career goals? What are you doing to achieve them?
at else can you be doing to achieve your career goals?

-	nhave an accountability partner to keep you focused on your career goals? If no someone you can call on to be your accountability partner?
Have y	ou reduced your career goals to writing? If so, what are they?
If you h	nave not reduced your career goals to writing, write them here.
	nvestment, in terms of money, time, training or education, do you need to e your career goals?
Are yo	u willing to make this investment? If not, why not?
If you o	could choose another career, what would it be? Why?

	nallenges or obstacles have you overcome during your legal career? ave you learned about yourself and the career by doing so?
On your concerr	deathbed, what do you want to be remembered for as far as your career is ned?

## My Business Development Plan

What types	s of clients do you want?
Who are yo	our referral sources?
Who are yo	our potential referral sources?
Do you hav	e a contact list of your potential referral sources? If not, who would you list?

	th high school, college and law school classmates are potential referral sources? tis their contact information?
or ch	ch members of voluntary bar associations, trade associations, nonprofits, hobby gronarities do you know who are potential referral sources? It is their contact information?
child	else do you know, whether from your house of worship, your children's school, your ren's sporting teams, or anywhere else, who are potential referral sources? t is their contact information?
Wha	t are your practice areas?
Do yo	ou have a niche practice? What is it?
If you	u don't have a niche practice, do you want one? If so, which one?

By whom?	community, what practice area or areas are you considered an expert in? Why?
•	considered an expert in one or more practice areas, what area do you want to expert in? Why?
what practi	g clients tend to gravitate to lawyers who are considered experts in their fields, in ce area or areas do you want to be considered an expert in and what steps should attain that reputation and status?
_	ers are considered experts in your practice areas, and what distinguishes them? create what they have done to achieve their reputations as experts in their fields?
Which refer next year? \	ral sources do you want to meet for breakfast, lunch, coffee or drinks over the When?
Which refer	ral sources do you want to call, e-mail, write or text over the next year? When?

	at involvement do you want in voluntary bar associations, trade associations or profits over the next year?
	at leadership positions in voluntary bar associations, trade associations or nonprofits dowant to pursue over the next year?
	at speeches, presentations, CLE, webinars, podcasts or other speaking opportunities do want to pursue over the next year?
	at books, articles, blog posts, blurbs or other writing opportunities do you want to pursue the next year?
Do y	ou have a social media strategy for marketing yourself? What is it?
Doy	ou consider yourself as having a brand? If so, what is it? How would you describe it?

What do you w	nt your professional brand to be? How do you plan on achieving it?
over the next y	ney do you need to pursue your business development and marketing efforts ar? What would your budget be if you included and added up all your ts (registration for conferences, travel, hotel, lunches, coffee meetings, etc)?
What other eff your practice (	rts do you want to expend over the next year to develop business or market r firm)?

# My Niche

If you do no	t have a niche practice, do you want to develop one? Which one?
Based on yo well suited f	our law school training and experience, what niche practice do you believe you a for? Why?
_	our talents, interests and passions, which niche practice do you believe enjoy? Why?
	mind that clients tend to gravitate toward attorneys who are considered experts what niche practice would you be interested in and suited for?

	ou don't have a niche, but want to develop one, how can you become expert in that area?
Wł	nich of the following are you going to do over the next year to develop your niche practi
	Speak or present on your practice area?
	Write and get published in your practice area?
	Be active on social media on your practice area?
	Get involved in an organization focused on your practice area?
	Lead an organization focused on your practice area?
	Read and research about your practice area?
	Attend CLE about your practice area?
	Attend a conference about your practice area?
۱۸/۱	nich clients are you going to pursue in your practice area?

### My Leadership

How do	you define leade	rship?			
What q	ualities does an ef	fective leader h	nave?		
What p	rinciples does an	effective leader	follow?		
What v	alues does an effe	ctive leader hol	ld dear?		
What p	ersonal shortcom	nings undermin	e leadership?		
Do you	consider yourself	a leader? Why	? Why not?		

	onsider yourself a leader, what leadership qualities do you have?
If you d	lo not consider yourself a leader, what leadership qualities do you lack?
	jualities should you work on to improve your leadership?
What b	ooks can you read on leadership?
	ED Talks, podcasts, Youtube videos or other online programming can you watch lership?
	eaders do you personally know? What makes them good leaders? What can you le nem? Are they open to meeting with you to discuss their approach to leadership?

Are the	re any courses, classes or programs on leadership you're interested in pursuing
	eadership positions have you held during your life? What did you learn nose experiences?
What le	eadership positions were you passed over during your life? Why?
	eadership positions do you want to pursue in the next five years? 10 years? remainder of your career?
What s	teps do you need to take to achieve these leadership positions?

# My Talents

s were you praised for?	
u believe your talents were?	
ls, if any did, you win and what were they for?	
d others tell you your talents were?	
d you consider your talents to be?	

As a teenager, what awards, if any, did you win, and why were you awarded them?
In high school, what were your hobbies?
In high school, what after school activities were you involved in and why?
If you participated in high school sports, what sports did you participate in, what positions d you have, how successful were you and how would you describe your role on the team?
If you participated in music, art, theater or dance in high school, what activities did you participate in, what was your role, what did you enjoy about it and what did others say about your participation?

	read in high school?	u watch and what books, magazines and Why did you watch what you watched and why dic
		ded? What did you think you'd accomplish or nose you turned down?
		lasses did you choose outside your major and why ou succeed in class and in your major?
What activities were	e you involved in and w	organizations were you involved in and why? vhy? What talents did you bring to bear to these hers in these organizations identify as your talents
•	ified to be a lawyer? W	l? Why did you choose law school? What made yo What skills did you plan on relying

	pool, what practice areas were you considering? E your talents that you believe made you equipped to practice in those areas?
moot cou	rticipate in law review? Why and what was your role? Did you participate in t? Why and what and how did you do? Did you participate in any other law sch What did you do, why and what talents did you rely upon?
Did you r	ceive any awards, accolades, or compliments in law school? If so, for what?
Did you w	ork during law school? If so, what skills did you develop and apply while working

When pr	eparing for the bar e	xam, what ca	me easy and	d what was d	ifficult?	
What co	mes easy at work and	d what comes	s difficult?			
What tas	sks do you enjoy at wo	ork and which	n ones do yo	u avoid?		
	mpliments do you rec and others?	ceive at work	from other :	attorneys, sta	ff, opposing	
		ceive at work	from other a	attorneys, sta	ff, opposing	
counsel						and wh
counsel	and others?					and wh
What ex	and others?	es that are ca				and wh

	, what do others tell you that your talents are? What compliment do you recei
	eceived any professional awards? Any other awards or accolades? For what contributed to you receiving these awards and accolades?
List all you developed	talents, starting with your most developed talents and ending with your least talents?

## My Weaknesses

What did	d you struggle v	with as a chil	ld?			
What did	d you struggle	with as a tee	nager?			
What cla	asses did you c	onsider the l	hardest?	Why?		
What cla	asses did you re	eceive the w	orst grade	esin? Why	?	
What die	d you struggle v	with in colleg	ge? Law S	chool?		
What do	you struggle v	vith at work?	?			

VVI	hat tasks do you try to avoid at work?
WI	hat tasks are you not given at work?
VI	hat do you think your weaknesses are?
Нa	ave others identified your weaknesses? Who? What did they say?
VI	hat have you done to work on your weaknesses?
	ave you embraced your weaknesses? Have you spent your time developing your ents and strengths?

Do you think it's better to work on your weaknesses or build your talents? Why?  How much energy, thought, time and effort do you spend on your weaknesses?  How about on your strengths?	Do you und	lerstand we all have weaknesses? How do you feel about that?	
How much energy, thought, time and effort do you spend on your weaknesses?			
	Do you thin	ık it's better to work on your weaknesses or build your talents? \	Why?
			sses?

# My Values

Wh	at are your values?
Wh	at values did your family teach you?
Wh	at values did you learn at school?
Wh	at values have you learned at work?
Wh	at values do you live by?
Org	ganize your values in order of importance, relevance and significance to you.

# My Mission

	n is your purpose. Your vision is how you achieve your purpose. Your missi vision. What is your mission? How do you plan on achieving it? What is you achieve your mission?
What is you	r vision? What is your meta goal to achieve it?
What is you	r vision? What is your meta goal to achieve it?
What is you	r vision? What is your meta goal to achieve it?
What is you	r vision? What is your meta goal to achieve it?
What is you	r vision? What is your meta goal to achieve it?
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What is you	r vision? What is your meta goal to achieve it?
What is you	r vision? What is your meta goal to achieve it?

# My Passions

A:	s a child, what were you passionate about?
As	s a teenager, what were you passionate about?
As	s a teenager, what would you day dream about?
W	/hat were you passionate about in college? In law school?
VV	/hat are you passionate about now?
	/hat aspects of your job are you passionate about? What aspects of your job are you rassionate about? What aspects do you find boring or rote?

Wha	at books, magazines or newspapers excite you?
Wha	at topics of discussion excite you at lunch, dinner or at cocktail parties?
Wha	at do you daydream about?
Is th	nere a job you could perform that you wouldn't consider work?
Wha	at do others say your passionate about?
Wha	at are you willing to get up early for and stay up late for?

vvnat ke	eps you up at night? What ar	you thinking about wh	en you can't sleep?
What do	es the word passion mean to	you? How do you define	e it?
What m	tivates you? What inspires yo	ou? What gets you going	g?
What ac	ivities do you need external r	notivators for?	

# My Fears

vvna	at scared you as a child?	
What	at scared you as a teenager?	
What	at scared you in college and law school?	
What	at scares you now?	
What	at fears hold you back?	
Have	e you or do you have any phobias? What are they? How have you addresse	ed them?

-	ou ever made a decision driven by fear? ras the fear and what was the decision?	
Are you	risk adverse? How much? Why? What drives you to being risk adverse?	
Have yo	ou ever overcome a fear? When? What were the circumstances?	
Do othe	ers describe you as risk adverse or as a risk taker? Have they said why?	
_	ou become more or less risk adverse as you have grown older? o you attribute that to?	
What fe	ears, if any, are holding you back from accomplishing your goals?	

## My Dreams

vvnat	were your dreams as a child?			
What	were your dreams in high school	ol?		
What	were you dreams in college and	l law school?		
What	are your current dreams?			
What	are your career dreams?			
What	dreams do you have outside you	ır career?		

	ams have you accomplished? Which ones are you working towards? es have you abandoned? Why?
How do y	ou define a dream?
With who	m do you discuss your dreams? What have you told them about your dreams
Have you	written down your dreams? When? Where? How?

## My Goals

AS a	child, what did you want to be when you grew up?	
As a	teenager, what careers were you considering?	
Whe	en did you decide to become a lawyer? Why?	
If yo	u had not become a lawyer, what career would you have pursued?	
In la	w school, what career did you envision?	
Wha	at aspects of your job are lined up with your goals? What aspects are not?	

-low d	o you define the term goal?	
What a	re your current career goals? What are your non career goals?	
	our goals changed over the last 5 years? Last 10 years? ave they changed? Why?	
How d	o you create, develop or decide upon your goals?	
Have v	ou abandoned any of your goals? Which ones? Why?	

———	you changed any of your goals	ye vvnich ones:	vvny?	
Wher	re do you see yourself in 10 yea	rs? 20? Why?		
How	would you want your obituary	to read?		
What	do you want to be said about y	you as part of yo	our eulogy?	
What	areas of practice do you want	to specialize in	? Why?	
What	types of clients do you want to	represent? W	hy?	

Are ther	re specific clients you want to represent? Why?
Are you	happy at your current position? If so, why? If not, why?
Is your d	current job consistent with your long term goals? Why? Why not?
Write al	l your goals.
them. A Would y	the goals you just wrote, and assume nothing could prevent you from accomplishin assume you had all the skills, resources and time to accomplish them? You still have the same goals? If not, what would they be? Would they be bigger? hey be more expansive?

## My Strategic Plan

What	are your values?		
What	are your principles?		
What	is your personal mission statem	nent?	
What	is your personal vision stateme	nt?	
What	are your talents?		

W	hat are your dreams?
W	hat are you passions?
	here your talents, dreams and passions intersect is where you will find your purpose. hat is your purpose?
W	hat are your goals?
W	hat action steps do you need to take to accomplish your goals?
W	hat is the timetable to achieve your tasks?

Wha	at is your budget to achieve your tasks?
Who	is your accountability partner to ensure you timely complete your tasks?
Hov	will you work with your accountability partner?

## My Family

Wh	nat do you want for your family?	
Wh	nat does each member of your family want?	
Wh	nat does your family, as a unit, want for yourselves	s?
Wh	nat are your spouse's wants, needs and goals?	
Wh	nat are your children's wants, needs and goals?	
Wh	nat can you do to help achieve your family's goals?	?

What o	an you do to help your spouse and children achieve their goals?
	activities, as a family, do you all enjoy? What can you do to facilitate doing of those activities?
What o	communication issues does your family have? How can you improve those issues
	ssues are holding your family back from growing closer? an you address them?
What a	are your family's strengths? How can you build on those?

### My Health

What	is your current health status?
Hasv	our health changed since law school? How?
	our ricular changed since law school. Trow.
	n is the last time you had a physical? Blood work? Been to the dentist? Your eyes checked? Had a cardiology work up?
What	medications are you on? Why?
Are yo	ou overweight? Do you have a plan to address your weight?
Are yo	ou sedentary? Do you have a plan to address your lack of exercise?

Do you	have any health issues? How	are you addressing	them?	
-	suffer from depression, anxie e you addressing it?	ty or another menta	al health issue?	
What p	lan do you have to address ar	y health issues you l	have?	

## My Finances

v v	hat is your current financial health?
Н	ow are your personal finances? Your family's? Your firm's?
Н	ow are your savings? How can you increase your monthly savings?
Н	ow is your spending? How can you decrease your monthly spending?
Do	o you have a budget? If not, create one.
	o you have financial goals, in terms of reducing spending and increasing savings? not, create such goals.

_	nave a plan to increase your compensation? If not, create one.  nave any side hustles? If not, are you interested in pursuing any?
Are the	re any side businesses you want to pursue? What's you plan to pursue them?
Do you l	nave any other potential streams of income? What are they?

## My Retirement

What a	age do you want to retire at?
How m	nuch money do you plan on saving for retirement?
Are you	u on track to retire on time? If not, what can you do differently?
What c	do you plan on doing after retiring?
How do	o you plan on living after retiring?
How do	o you see your life after retirement?

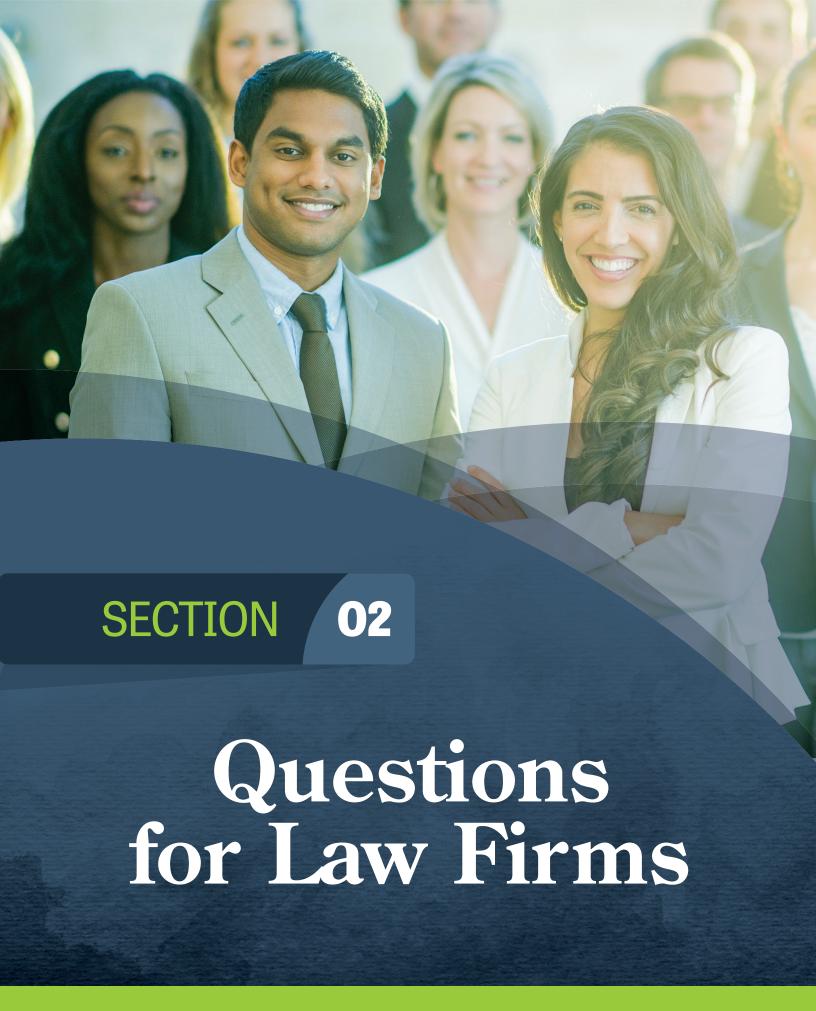
What's on y	our bucket list?				
What are yo	ou saving to do fo	or retirement?			
Do you have	any plans to vol	lunteer? To give	e back? To pay	t forward?	

#### Your Legacy

How	do you want to be remembered?
How	do you want your last employer to remember you?
How	do you want your former co workers to remember you?
How	do you want your former clients to remember you?
How	do you want your former opposing counsels to remember you?
How	do you want judges and juries to remember you?

How do you want your obituary to read?  What do you want people to say at your memorial?		
What do you want people to say at your memorial?	obituary to read?	
	ople to say at your memorial?	
What legacy do you want to leave?	ant to leave?	

Question Everything Questions Lawyers and Firms Should Ask Themselves -



#### **Our Finances**

What were	e your firm's revenues and expenses for your last fiscal year?	
What were	e you firm's revenues and expenses over your last five fiscal years?	
How have	your firm's revenues and expenses changed over the last five fiscal years?	
	re your five biggest clients over the last fiscal year? What percentage of the fird each of them comprise?	m's
	e your five biggest clients over the last five fiscal years? entage of the firm's income did each of them comprise?	
	your top five clients and the amount of revenue they generate ver the last five fiscal years?	

	new cases has your firm opened over the last five years? What revenue did those orate? How has that revenue stream changed over the last five years?
	have been your firm expenses over the last year?
	have been your firm expenses over the last five years? have those expenses changed?
What	efforts has your firm taken to reduce expenses? What expenses did it reduce?
What	is the cost, per attorney, to operate the firm?

How ha	as the cost, per attorney, to operate the firm, changed over the last five years?
What w	as the profitability of each of your attorneys over the last fiscal year?
What w	as the profitability of each of your attorneys over the last five fiscal years?
How ha	as the profitability for each of your attorneys changed over the last five years?
Who ar	re your best performing attorneys, in terms of revenue?
Who ar	re your worst performing attorneys, in terms of revenue?
Do you	have a line of credit? How large is it? What do you use it for?

-	your line of credit changed over the last five years? By how much? t have you used it for?
	often does your firm review its budget? How often does it revise it? t prompts these reviews and revisions?
	payroll, what are your five largest expenses? How have those expenses changed ast five years?
Who	at your firm has input into the budget? What role do they play?
	does your firm decide how partners are compensated? Associates? has your compensation system changed over the last five years?
Who	are your firm's biggest rainmakers? Do you have a succession plan for them and t ts?

What does	your firm do with an underperforming partner? Associate?
	money does your firm spend on business development? What are these monie How have these expenses changed over the last five years?
	e range of your law firm's billable rates? What is the average rate? What has been for your law firm's billable rates over the last five years? How has that rate change five year?
What types	s of cases and which clients pay your firm the highest billable hourly rates?
What types	s of cases and which clients pay your firm the lowest billable hourly rates?
	ts has your firm made to transition from lower rates, and lower paying cases, to es and higher paying cases?

#### **Our Practice Areas**

What have been your law firm's practice areas over the last five years? How have those practice areas changed?  What does the legal community know your firm for?  What are your firm's top five practice areas? What are its bottom five practice are  What are your firm's practice groups?  What practice areas does your firm emphasize on its website? In its marketing? What number or percentage of your lawyers fall into each of your firm's practice is	
What does the legal community know your firm for?  What are your firm's top five practice areas? What are its bottom five practice are What are your firm's practice groups?  What practice areas does your firm emphasize on its website? In its marketing?	
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What are your firm's practice groups?  What practice areas does your firm emphasize on its website? In its marketing?	
What are your firm's practice groups?  What practice areas does your firm emphasize on its website? In its marketing?	
What practice areas does your firm emphasize on its website? In its marketing?	eas?
What practice areas does your firm emphasize on its website? In its marketing?	
	areas?

What a	re your most profitable practice areas?
	of your practice areas produces the most press and media coverage and on on social media and beyond?
Which	of your practice areas produced the least amount of attention?
How ar	re your practice teams staffed?
How do	o you market your practice areas?
What s	upport does your firm offer your practice groups?
What p	practice areas do you want your firm to focus on in five years? Ten years?

#### **Our Culture**

How wou	ld you describe your firm's culture?
How do y	ou think the partners at your firm would describe your firm's culture?
How do y	ou think the associates at your firm would describe your firm's culture?
How do y	ou think your staff would describe your firm's culture?
How do y	ou think candidates applying at your firm would describe your firm's culture?

	nas your firm developed its culture?
What	affirmative steps has your firm taken to develop its culture?
How r	much of your firm's culture is due to happenstance, luck or coincidence?
lf you	could reduce your firm culture to a catch phrase, what would it be?
Do yo	u have a "no jerk" policy? If so, how is it enforced?
How is	s your firm culture reduced to writing? What firm written policies, if any, your firm have that solidifies its culture?
	your minimate that contained to curear or

How does	your firm address an attorney who doesn't conform to the firm's culture?
Has your fi	irm culture evolved? How?
How does	your firm culture affect recruiting?
How does	your firm culture affect business development?
How does	your firm culture affect team building?
How do yo	u use your firm culture in marketing?

What char	ges do you want to make to your firm culture? Why?	
How are n	ew members of the team taught the firm culture?	
What cons	equences exist for not complying with the firm culture?	
How can t	ne firm use its culture to grow its revenues?	

# Our Hiring

Who ha	as the firm hired over the last year?
Who ha	as the firm hired over the last five years?
Who ha	as left the firm over the last year? Why?
Who ha	as left the firm over the last five years? Why?
What ty	ype of lawyers does the firm want to hire over the next year?
What ty	ype of lawyers does the firm want to hire over the next five years?

How	big does the firm want to grow in the next five years? Ten years? Twenty years?
How	does the firm plan on growing?
How	does the firm recruit partners? Associates?
What	t types of partners does the firm hire? Associates?
What	t qualities does the firm look for in new hires?
	e firm interested in merging with another firm? Bringing in a practice group? r large moves?

#### Our Growth

	es; (5) size of offic ize of staff?	es; (6) revenue; (7 	7) revenue pe	r partner; (8) rev 	enue per assoc	iate
How	have these numb	pers changed ove	er the last five	years?		
Wha	at do you want the	se numbers to be	e in five years	? Ten?		
Do y	ou have a plan to a	achieve these nu	mbers? Wha	it is the plan?		
Wha	at discussions has	your firm had ab	oout growth?			
 Wha	at is your firm's goa	als about future ç	growth? Wha	at is the basis for	these goals?	

If you want gro	wth, why? What's driving the desire for growth?
How fast do you	u want to grow? Why?
How does the f	irm plan to accommodate growth?
How does the fi	irm plan to incorporate new team members?
What changes	do you expect to occur as your firm grows? How will the firm address that
	pect the firm to change and evolve as your firm grows? m address that?

## Our Strengths

Wh	at are your firm's strengths?
If yo	ou surveyed your partners, what do you expect they would say your firm's strengths are?
If yo	ou surveyed your associates, what do you expect they would say your firm's strengths are
Has	s your firm's strengths changed? When and how?
Wh	at is your firm best known for?
Wh	at are your firm's guiding values and principles?

What	t are your firm's weaknesses?
How	has your firm's weaknesses changed over the last five years?
How	has the firm addressed its weaknesses?
What	t weaknesses have been transferred into strengths? When and how?
Wher	n has your firm overcome adversity? How?
Wher	n has your firm made a difference? How?

### Our Challenges

٧	What are the challenges facing the firm?
-	
٧	What obstacles stand in the firm's way?
_	
\	What are internal challenges facing the firm?
_	
\ -	What are external challenges facing the firm?
-	
\	What are internal threats facing the firm?
-	
\	What are external threats facing the firm?
_	

	e firm's main competitors? What can you learn from them? u distinguish yourself from them?
What disrup	otions do you anticipate to the delivery of legal services?
What chang	ges do you anticipate how in clients select counsel?
will continue	ges do you anticipate regarding how clients pay counsel and what services they e to pay for and what services will be absorbed in house, will be sent to a third or or simply become fungible?
_	ges in other sectors of the economy (retail, health, transportation, etc) may affects model? How can you prepare for those changes?
	u change your business development and marketing efforts to address the facing your firm?

# Our Training

How d	does your firm train its attorneys?	
What	training or orientation does your firm offer its partners?	
	training or orientation does your firm offer its associates?	
	training or orientation does your firm offer its staff?	
What	training does your firm offer for pretrial skills? Trial skills?	

Wha	at leadership training does your firm offer?	
Wha	at customer service training does your firm offer?	
Wha	at business development and marketing training does your firm o	ffer?
Wha	at public speaking and writing training does your firm offer?	

#### **Our Future**

When	e do you see the firm in five yea	rs? Ten years	s?		
How b	ig will the firm be in five years?	Ten years?			
How r	nany offices will the firm have in	n five years?	Ten years? V	Vhere will the (	offices be?
What	do you expect the firm's revenu	es to be in fiv	ve years? Ten	years?	
What	new practice areas are on the I	norizon that	the firm shou	ld pursue?	
	new types of cases and matters o handle those matters? If so,				

	changes outside of your firm do you expect to affect operations in your firm? nould the firm respond?
	changes do you expect to occur to the legal market? Legal field? The practice? nould the firm respond?
	o you see the legal market, sector and practice changing over the next ten years years?
	ech changes do you expect will affect the practice over the next ten years? years?
What is	s your firm doing to stay ahead of the law tech curve?

### Our Strategic Plan

What	is the firm's vision statement? When was it last revised?
Nhat	are the firm's principles? When were they last discussed?
What	are the firm's values? When were they last discussed?
Vho	are the firm's top clients? Have those clients changed over the last five years?
Nho	are the firm's best clients? Have those clients changed over the last five years?

	re the firm's worst clients? Have they changed over the last five years?
	s the size of the firm in terms of partners, associates, personnel, office space venue? How has that changed over the last five years?
What a	are the firm's strengths?
What a	are the firm's weaknesses?What opportunities does the firm have?
What t	hreats does the firm face?
What b	oig changes, if any, does the firm want to make?

WI	hat are the firm's priorities?
	the firm had to choose between three and five priorities for it to focus on for e next three to five years, what would they be?
Wł	hat would be the firm's plan to tackle these priorities?
Wł	hat action steps would the firm take to fulfill this plan?
Wł	hat is the budget for this plan?
Wł	hat is the timetable for this plan?

	will the firm hold its attorneys accountable to pursue, plete and accomplish the plan?
	at procedures can the firm implement to determine if changes need to be le to the plan over time and if so how and when?
Wha	at can be measured to ensure the plan is appropriate, proper and successful?

### Our Business Development Plan

vviiat pi actici	e areas does the	mm want to p	ur sue ariu gr	yvv :		
What types of	clients does the	firm want to p	oursue?			
What specific	clients does the	firm want to p	oursue?			
•	of business deve	•	•		nt to spend	
What should Associates?	:he firm's market	ing budget be	? What should	d partners' ma	ırketing budge	et be?

	at are the principles that should direct the firm's marketing efforts? at direction should be offered to partners when marketing? To associates?
Hov	v should practice groups market their practice?
Hov	v should individual attorneys market their practice?
Hov	v can the firm use its website to market itself?
Hov	v can the firm use social media to market itself?
Hov	v else can your firm market itself?

#### Our Succession Plan

Does your f	irm have a succession plan? What o	does it consist of?
	our senior partners plan on retiring i ? What is the firm's plan to address	in the next year? Five years? Ten Years? What this transition?
	firm's plan regarding compensatior and beyond?	n for these partners as they transition into
What is the	firm's plan to transition their clients	to others in the firm?
	s are being made to introduce and a s at the firm built relationships with t	acquaint their clients to others at the firm an hose clients?

	nversations has the firm had with these senior attorneys?
	ve these senior attorneys said their expectations are in terms of status, sation, and the like during and after transition?
What is t	the firm's expectations about these issues?
passing t	corneys will become the relationship and service partners for the clients from the senior partners to the law firm? What will their role be? We they been trained to assume these new roles?
	eps have senior partners taken to ensure their financial security after retireme pectations do they have from the firm after retirement?

If not,	the firm should create one and reduce it to writing.
	steps is the firm taking to ensure clients receive the same level of treatment, servi are at the point of transition and beyond?
hopef	communications are the senior partners and firm making as to those clients that ully will remain with the firm? What steps are being taken to ensure they remain with a senior partner retires?
	does retirement look like for senior partners? Is there a senior status? does senior status mean?
	vill retiring partners be used to market the firm? vill they be compensated for these services?

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