



The WJF Institute T.E.A.M. Tool™

Team Effectiveness Assessment and Measurement

Please answer the following statements as true or false. Then score the effectiveness of your firm's client-focused teams.

	True	False
1. Our firm has a client team in place for most of our key clients.	<input type="checkbox"/>	<input type="checkbox"/>
2. Each of these client-focused teams has an effective client relationship manager leading the team.	<input type="checkbox"/>	<input type="checkbox"/>
3. The firm has an established firm-wide <i>planning methodology</i> for the client-focused teams to follow, including measurable goals determined by the team.	<input type="checkbox"/>	<input type="checkbox"/>
4. The team sets measurable goals: revenue, profit, client loyalty and increase in usage of additional practice groups within the firm.	<input type="checkbox"/>	<input type="checkbox"/>
5. A written plan is in place for each key client that defines how the firm plans to retain, grow and service the key client.	<input type="checkbox"/>	<input type="checkbox"/>
6. The team meets frequently to follow up on the key client plan in place.	<input type="checkbox"/>	<input type="checkbox"/>
7. Our firm's leadership and marketing/business development professionals conduct client opinion surveys of our key clients to get feedback on how our firm is performing to insure client loyalty.	<input type="checkbox"/>	<input type="checkbox"/>
8. The firm's leadership holds internal review meetings to determine if the client relationship managers and the teams are meeting the firm's measurable goals for these clients.	<input type="checkbox"/>	<input type="checkbox"/>
9. Our firm's management evaluates each attorney's contributions to the firm's key client team efforts and bases their annual compensation and recognition on whether they helped their team meet or exceed the goals.	<input type="checkbox"/>	<input type="checkbox"/>
10. Our firm's managing partner communicates clearly and frequently the importance of the key client team effort in our firm.	<input type="checkbox"/>	<input type="checkbox"/>

Score:

Scoring Key: Tally the number of true answers. The total reflects the effectiveness of your firm's leadership and management of the key client teams.

0 to 7 = Our firm's client teams effectiveness needs significant changes.

8 = Our firm has some of the components in place to be effective; however, we are at risk of losing market share in our key clients.

9 = We are far better at providing service than our competitors and we should be able to get work from clients where we coexist.

10 = We are the dominant player in the markets where we are present and we need to turn up the heat on our competition.

