



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 planning methodology 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 met or exceeded their team's 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 team 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.

