

Where Is Your Firm Stuck?

A ten-minute operations self-assessment for growing law firms

Four signs you're stuck. How many sound like your firm?

- ☐ **Everything routes through one or two people.** If one of them is out for two weeks, something important breaks: payroll, intake, a vendor relationship, the thing only they know how to do.
- ☐ **Decisions get made on gut and memory.** "I think that referral source is good." "It feels like we're busy." "We're probably fine on cash."
- ☐ **The back office is whoever had time.** Operations wasn't designed; it accumulated. Jobs landed on whoever was standing nearby when the need came up.
- ☐ **Nobody can say whether the firm makes money on the work it does.** Not the firm overall. The work: which cases, which clients, which kinds of matters actually pay.

If you checked two or more, you're not failing. You're stuck, and that's what success looks like from the inside. A firm that never grows never has these problems. The next sixteen questions show you where.

How to use this

- 1 More than one person fills it out, separately.** At minimum, one owner or partner and the person who runs operations day to day (administrator, office manager, COO). Better: the operator plus up to two partners. Each person gets their own copy of pages 2 and 3.
- 2 Score on your own, without discussing it.** About ten minutes each. Don't compare answers until everyone is done.
- 3 Then compare, using the sheet on page 4.** Where your scores match, you see the firm the same way. Where they're far apart, that gap is the first conversation worth having. It usually means expectations that were never made clear, or a problem one of you can see and the other can't.

Partners and operators can undercut each other without meaning to. Every fix starts with the two of you looking at the same picture.

Your role: ☐ Owner / partner ☐ Operator ☐ Other: _____

Score each statement honestly. **2** yes, solidly true **1** sort of, on a good day **0** no

People CHAPTER 1

SUBTOTAL / 4

- 1 I can name the one person who owns each key function (payroll, intake, vendors, the calendar), and our staff would name the same people.
- 2 Everyone here gets structured feedback at least twice a year, on a scale that means the same thing no matter who's doing the rating.

Pay CHAPTER 2

SUBTOTAL / 4

- 3 If our payroll person were out for a month, payroll would still go out correctly and on time.
- 4 I could explain, in one sentence per role, how pay is set and how raises happen, and nobody hearing it would call it arbitrary.

Vendors CHAPTER 3

SUBTOTAL / 4

- 5 I could produce a one-page list today of every recurring vendor: its annual cost, what it delivers, when it renews, and who here owns the relationship.
- 6 Our vendor accounts and admin rights are in the firm's name, and if we left our case management system, we know how we'd get our data out.

The Work Itself CHAPTER 4

SUBTOTAL / 4

- 7 Pick the process that annoys everyone most. A written version of it exists: the steps in order, with an owner on each.
- 8 Someone who has never done that process could run it correctly from the write-up alone.

Technology & AI CHAPTER 5

SUBTOTAL / 4

9 For every major tool we pay for, I can name the one-sentence workflow problem it solves.

10 We use AI on the business side of the firm, with a person reviewing the output, and we can point to where it has saved us real time.

The Money CHAPTER 6

SUBTOTAL / 4

11 I can say whether the firm made money last month, and my answer doesn't come from the bank balance.

12 I know which dollars in our accounts are actually ours to spend, and trust funds never mix with operating funds. No exceptions.

Compliance CHAPTER 7

SUBTOTAL / 4

13 Someone who knows current employment law has read our handbook and leave policies in the last two years.

14 Everyone here is classified correctly (exempt or non-exempt, employee or contractor) by their actual duties, not their job title.

Decisions CHAPTER 8

SUBTOTAL / 4

15 I know our most valuable referral source by what its cases earn, not by how many it sends.

16 I watch new matters opened each month against the same month last year, not just what's settling.

Your total / 32

By area (each subtotal, out of 4): **4** not where you're stuck · **2-3** pieces, not a system · **0-1** start here

26-32

You're mostly unstuck. Tune the weak spots and keep a regular rhythm of checking them.

13-25

You're partway there, with two or three real gaps. Start with your lowest-scoring area. Don't try to fix everything at once.

0-12

You're stuck in most places at once. That's not a failure; it's where success lands you. The lowest scores are also the highest-return fixes, and now you know where they are.

Put your scores side by side

Area	Operator	Partner A	Partner B	Biggest gap
People (1-2)	/ 4	/ 4	/ 4	
Pay (3-4)	/ 4	/ 4	/ 4	
Vendors (5-6)	/ 4	/ 4	/ 4	
The Work Itself (7-8)	/ 4	/ 4	/ 4	
Technology & AI (9-10)	/ 4	/ 4	/ 4	
The Money (11-12)	/ 4	/ 4	/ 4	
Compliance (13-14)	/ 4	/ 4	/ 4	
Decisions (15-16)	/ 4	/ 4	/ 4	
Total	/ 32	/ 32	/ 32	

Reading the comparison

- ☐ **Don't average your scores.** An average hides exactly the thing this page is for.
- ☐ **Any single question where one of you scored 2 and another scored 0** is the first conversation to have. Someone can see something the other can't.
- ☐ **Any area two or more points apart** comes next.
- ☐ **If the partners disagree with each other**, that's its own finding, and usually a more important one than any score.
- ☐ **Where everyone agrees on a low score**, you've already done the hard part: you agree on the problem. Start there.

More than two partners? Add a column for each. Scoring alone with one administrator? Two columns is enough.

Send me your results, and I'll send you a quick fix.

Email your scores and I'll send back a quick, free fix: a worksheet for one of the most common gaps, which you can run in an afternoon without me.

info@mcartoradvisory.com

What to send

- Each person's role (operator, partner) and their score for each of the eight areas. Names aren't needed.
- Roughly how many people work at the firm, and your main practice area.
- Your answers to three questions about the assessment itself:
 - 1 Which question was hardest to score, and why?
 - 2 Where did the people scoring disagree most, and what did the conversation turn up?
 - 3 What did you expect to be asked that wasn't here?

Please don't send client information or anything confidential. The scores are all I need.

I read every one myself. I won't add you to a mailing list, and you won't hear from me again unless you write back.

This assessment draws on *Where Growing Firms Get Stuck* by Bill McArtor. Each area matches a chapter, with the full self-check and what "good" looks like.

Nothing here is legal, tax, or financial advice. Classification, trust-accounting, and employment-law questions should be confirmed with your own counsel and accountant.