



## How Does Your Firm Score?

Whitepaper / Issue 3

**The first 10 questions deal with your firm's business development efforts, and the next 10 address your internal culture. Score each on a 1-10 scale, with 1 being poor and 10 superior.**

<b>Business Development Scorecard</b>	<b>Score</b>	<b>Internal Culture Scorecard</b>	<b>Score</b>
<b>1</b> A well thought out written marketing plan is in place and followed.		<b>1</b> The firm has an updated strategic plan, and an ongoing planning process.	
<b>2</b> The firm has segmented its market, and approaches it's marketing segment by segment.		<b>2</b> The firm has a consensus regarding its mission, goals, and values.	
<b>3</b> There is a plan in place to solidify and expand existing client relationships.		<b>3</b> The firm has high profile leadership, and a participative style of management.	
<b>4</b> A process involving direct contact with prospects is in place to generate new business.		<b>4</b> Clear-cut performance standards are in place and adopted by all.	
<b>5</b> The firm utilizes a database to track all business development activity, which serves as the administrative hub of these activities.		<b>5</b> Rituals exist to support firm values, and rewards are given to those who achieve.	
<b>6</b> Internally, the business development function is prioritized, and individuals involved in this effort receive "credit" for their efforts.		<b>6</b> Openness of communication exists upwards, downwards, and horizontally.	
<b>7</b> Ongoing coaching and training occurs for professional staff to maximize their interactions with clients, prospects, referral sources.		<b>7</b> Company culture highlights excitement, pride, and esprit de corps.	
<b>8</b> Business development activities performed by professional staff are rewarded with regard to expectations concerning billable hours.		<b>8</b> A culture exists where inferior performance is not tolerated, and where true accountability exists.	
<b>9</b> The firm's website and printed materials reflect the firm's strengths, and are consistent and high quality.		<b>9</b> Teamwork is a key element of the organization, and functional unit goals are subordinate to firm goals.	
<b>10</b> The firm has created an effective positioning strategy and statement that clearly delineates itself from the competition.		<b>10</b> The firm has a market driven orientation, and client satisfaction is paramount.	
<b>Your Total Score</b> (out of a possible 100) _____		<b>Your Total Score</b> (out of a possible 100) _____	