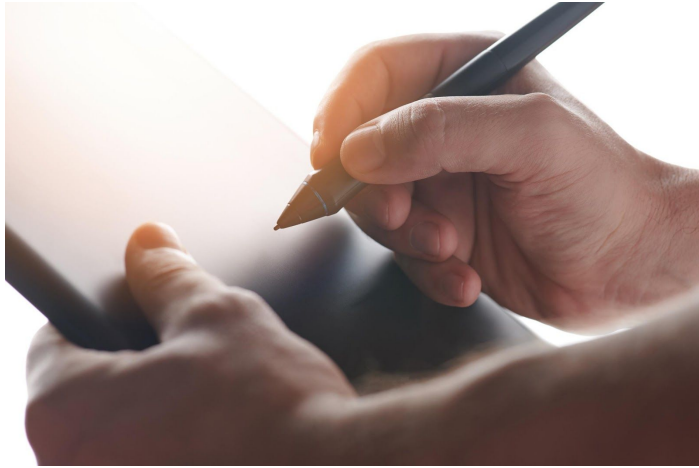


Law Firm Evaluations

Resource Overview



How to use this guide

Following is an overview of the work done by CLOC Committees specializing in this particular topic or interest area. To gain the most from this resource, please review this document and use the links along with the search function on cloc.org to obtain the latest tools, guides, and templates to help you in application and implementation.

Introduction

With ever-increasing expectations for value, companies are becoming more interested in quantifying the nature of the support they receive from their firms across various factors, from responsiveness to results to costs.

Luckily, performance evaluations are not always a one size fits all. Before implementing a performance evaluation program, it is important to determine the best approach based on the number of firms that you work with and the different types of relationships that you have with each of firm (ongoing, as needed, or special expertise).

Considerations

Before implementing performance evaluations, consider the following:



- **What firms do you want to evaluate?** By preferred firms, practice area, spend, the volume of work, or by outcome/special project.
- **What are the key performance indicators (KPIs) that are important in your evaluation?** How will you track and measure the KPI's consistently?
- **What evaluation platform will you use?** An evaluation form, in-house survey, or software applications are a few options.
- **What criteria will you use in evaluating performance?** Quality of work, responsive service or fees, how many corrective actions were taken, inaccurate invoices missed deadlines, etc.
- **How will you communicate feedback to the firms after the performance review?** Who is ultimately responsible for reviewing the firm and analyzing the data collected?

Once you decide on the firms that you want to evaluate, the next step is to establish an internal review process to determine the criteria, frequency, and deployment method. By providing this information to your participating attorneys, it will empower them to be thorough with their feedback and help ensure that all firms are held to similar standards.

It is important that you set up a follow-up meeting with key stakeholders from your organization and the firm after any reports or feedback have been provided.

Feedback meetings should be designed to accomplish the following:

- Ensure that all firm(s) have carefully reviewed the report.
- Share positive feedback on the work the team has been doing.
- Identify strengths and areas of opportunity for improvement.
- Address issues early and as they happen.
- Create and review your strategic plan to clarify aligned objectives.

Also, it may be a great opportunity for you to allow the firm to provide feedback to your organization about the relationship and the performance of your team.

Thorough evaluations and annual business reviews with your law firms ensure that both parties are aligned, in order for the relationship to continue to be mutually beneficial for long term success.

Conclusion

Law firm partnerships are critical to the operations of a legal department and it's important to recognize that continuous improvement requires patience and partnership. At CLOC, we understand that and want to provide you access to tools and resources to strengthen those partnerships.



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