

- E. Please describe how you expect to improve personal productivity for the coming year.

COMMENTS: Ideas that could be included are: Working more hours - state how many; working on higher paying files - list the types of files; improved efficiency - describe; better use of paralegals and staff - name the paralegals and staff.

You may want to include gross billings and/or origination of business.

III. Client Development

- A. Describe any plans you have for targeting new clients (list three clients).

COMMENTS: Require a written strategy for each target and monthly/quarterly reporting as to status

- B. Describe any specific activities such as speaking or writing which you plan (list target forums and topics for articles).

COMMENTS: Same strategy as A.

- C. Describe any specific activities such as speaking or writing which you plan (list target forums and topics for articles).

COMMENTS: Partners should target at least one forum for a speech and submit the topic and game plan to be used to secure the engagement and should target at least one publication and write an article by a specified date. You may want to require multiple speeches and articles.

- D. List the community, professional, and civic groups in which you plan to be active in the coming year. Additionally, describe how you plan to use your membership in those groups for client development.

COMMENTS: Require quarterly progress reports.

- E. Describe any other marketing activities not otherwise described here in which you plan to participate.

IV. Participation in the Team Concept

- A. Describe your methods for introducing your clients to other lawyers in the firm.

COMMENTS: Specific clients and lawyers should be listed.

- B. Describe your methods for distributing work to other lawyers.

COMMENTS: Types of work and specific lawyers should be listed.

- C. Describe your methods for turning over client management to others. In particular, specify any particular clients you intend to transition over to other lawyers.

COMMENTS: Specific clients and lawyers should be listed.

V. Quality Control

- A. Describe any plans you have for developing systems and other quality control mechanisms in your practice area.

COMMENTS: The system, the purpose of the system, and target date for completion should be described.

- B. Describe your methods for ensuring that work is done in a timely manner, including following up on work you delegate to others.

COMMENTS: Selected clients should be queried regularly to determine if work is being completed in a timely manner.

VI. Professional Development

- A. Describe any specific professional goals you have such as bar association and related activities.

COMMENTS: Require progress reports.

- B. What are your plans for continuing legal education?

COMMENTS: Targeted CLE should be listed.

- C. Describe any specific goals to improve your skills and ability to be responsible for increasingly more complex and sophisticated matters.

VII. Management

- A. List any management activities in which you plan to be involved.

COMMENTS: Job descriptions and an evaluation process for each management assignment should be prepared, such as Management Committee, Compensation Committee, Recruiting, etc.

VIII. Weaknesses

- A. List recognized weaknesses that must be improved/eliminated.

COMMENTS: Consider a requirement to improve/cure the deficiency before the partner is eligible for an extraordinary award.