

Futures Readiness and Self-Assessment Tool



TRANSFORMING THE DELIVERY OF LEGAL SERVICES IN CANADA – ARE YOU PREPARING FOR THE FUTURE?

Assess your practice by considering the following questions:

Your Environment

- What is unique about the environment in which you provide legal services:
 - ✓ Geographic location
 - ✓ Specialized expertise
 - ✓ Defined or niche clientele
 - ✓ Use of technology
 - ✓ Fee structure
 - ✓ Other?
- What is the demographic makeup of your practice? How does the makeup of your practice compare to the demographic makeup of your client base?
- Other than lawyers, who provides services that are similar to — or the same as — yours in your immediate geographic area, or in Canada more generally?
- What value do you provide that is different than your competitors?
- What could you learn from how clients receive services from other professional and commercial practices like dental offices, medical clinics, accounting firms and online shopping sites?
- Do you have a community of like-minded practitioners that support you in efforts to change?

Your Clients

- How would your clients describe you as a lawyer:
 - ✓ Trusted advisor
 - ✓ Collaborative problem solver
 - ✓ Savvy business person
 - ✓ Cutting edge innovator
 - ✓ Other?
- What kind of clients will you have in ten years? Will they be the same as your current client mix?
- What are your clients telling you about the value they find in your work?
- What do your clients say about how you price your services?
- Are your clients asking for their files to be disaggregated (i.e. unbundling)?
- Have you considered outsourcing some of your work and, if so, what value would that bring to your clients?
- Have you recently surveyed your clients on service delivery? Have you addressed any concerns they may have expressed?

Your Practice

- How would an outsider describe your practice:
 - ✓ Traditional
 - ✓ Efficient
 - ✓ Innovative
 - ✓ Technology-enhanced
 - ✓ Other?
- How do you measure the efficiency of your work and its value to your clients?
- Have you used strategic planning tools or workflow analysis in your practice?
- Would techniques of project management assist you in your practice?
- Do you feel appropriately equipped through training in practice management skills?
- What opportunities exist in your market that you might not have addressed?
- Could parts of your work be enhanced – or replaced by – technology?
- What potential benefits could be created by working in a multidisciplinary or collaborative environment?
- How could overseas innovations like Alternative Business Structures (i.e. allowing for non-lawyer ownership of legal practices) affect your practice?

Your Goals

- What are your goals for your practice in ten years:
 - ✓ Maintain or increase profitability (without necessarily growing revenue?)
 - ✓ Expansion to new client bases
 - ✓ Increased use of technology
 - ✓ Retirement
 - ✓ Other?

Your Future

- What are the biggest challenges in transforming your practice:
 - ✓ Maintaining the quality of your services in a changing environment
 - ✓ Developing and implementing a new structure for pricing your services
 - ✓ Increasing your creative use of technology
 - ✓ Developing your unique brand
 - ✓ Offering services that provide value to clients and meet their needs
 - ✓ Other?
- What could you do better if you could structure your practice differently?
- What more could you do if non-lawyers could help manage or invest in your practice? Are there disadvantages?
- Do you feel equipped with the skills to be an entrepreneur or business manager? If not, where will you acquire them?
- How would you test your ideas about new legal services? How do you refine your ideas? How can you incorporate lessons learned (including failed efforts) from any effort to innovate in service delivery?
- Will your firm support innovative billing structures?

Your Responsibilities Beyond Your Immediate Clients

- Where do you see under-served market sectors? What do your clients wish you could help them with? How would you go about offering services to those under-served markets, or addressing unmet legal needs?
- As the future of legal services in Canada depends on providing services that are better tailored to your clients' realities, what can you do to bring both diverse lived experiences and diverse personal and professional backgrounds to the makeup of your practice?
- How are you ensuring that your firm or practice is meeting its obligations in regard to accessibility and inclusivity of services?

Did any of these questions give you pause for thought? Feel free to consult the resources referenced in our Select Bibliography (Appendix 7). Stay tuned to www.cbafutures.org as we publish more tools – including a Planning for the Future Guide for lawyers and law firms in the fall of 2014 - and join our forthcoming Twitterchats on the issues that will be of most use to you in adapting to the future. What else do you need to prepare yourself for the future of legal services in Canada? Tell us at futures@cba.org.