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| --- | --- | --- | --- | --- | --- |
| **Inquiry** | **Yes** | **No** | **N/A** | **Notes/Comments** | **Note improvements needed & dates for**  **follow up** |
| **Marketing Your Firm** | | | | | |
| **1.** Are you attracting new, quality clients to your firm? |  |  |  |  |  |
| **2.** Are you retaining quality clients? |  |  |  |  |  |
| **3.** Do you have a written marketing plan that you follow to attract new clients or maintain current clients? |  |  |  |  |  |
| **4.** When you close a file, do you survey or at least ask your clients about their experience with your firm? |  |  |  |  |  |
| **5.** Do you ask new clients what brought them to your firm? |  |  |  |  |  |
| **6.** Do you call or write to thank other attorneys or clients who refer new clients? |  |  |  |  |  |
| **7.** Do you set aside time each week to market your firm (client lunches, contacts with other lawyers who might refer your business, etc.)? |  |  |  |  |  |
| **8.** Are you up to date with the current advertising rules? |  |  |  |  |  |

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| **Inquiry** | **Yes** | **No** | **N/A** | **Notes/Comments** | **Note improvements needed & dates for follow up** |
| **Marketing Your Firm** | | | | | |
| **9.** Do clients often refer new clients to your firm? |  |  |  |  |  |
| **10.** Do other lawyers often refer new clients to your firm? |  |  |  |  |  |