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Law Firm Goal-Setting Checklist

Turn a broad aim into a baseline, owner and decision.

Use it when	a priority has no measurable operating target

Boundary	This is an operating aid, not financial, employment or performance-management advice.

Built for independent law firms in England and Wales

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1. Frame the decision

A useful goal has a baseline, owner, data source and decision rule. Activity must not hide quality loss.

Specific focus	Write one outcome with a source-labelled baseline and quality guardrail.

Questions to answer

- For this guide: Write one outcome with a source-labelled baseline and quality guardrail.
- What outcome changes?
- What is baseline?
- Who owns source data?
- What action follows result?

Avoid

- target without baseline
- measure no one can reproduce
- optimising speed while quality falls

2. Control sheet

Treat a blank evidence field as a reason to pause, not a reason to guess. Record sources and owners before changing the workflow.

Area	Evidence to collect	Pass condition
Outcome	Change and beneficiary	Specific and bounded
Baseline	Value, date and source	Reproducible
Measure	Formula and frequency	No hidden denominator
Guardrail	Quality or risk floor	Cannot hide harm
Decision	Threshold and action	Changes behaviour

Fail closed

If an input, owner or approval is missing, record the gap and keep the affected step outside the proposed change.

3. Working record

Complete this page with counts, dates and named sources. Do not include client names, matter names, contract text or privileged material.

Field	Evidence or answer
Guide focus	Write one outcome with a source-labelled baseline and quality guardrail.
Objective	
Baseline	
KPI or result	
Data source	
Guardrail	
Owner and date	

Evidence quality check

- The source is named and dated.
- An estimate is labelled as an estimate.
- The owner can reproduce the measure.
- The same method can be used after a change.

4. Decision record

Select the outcome that the evidence supports. A stop or no-change decision is valid.

- Stop: a required source, owner or approval is missing.
- Fix: repair the underlying route before adding technology or cost.
- Test: run one bounded change with a baseline and review date.
- Proceed: adopt only the option supported by the recorded evidence.

Decision field	Record
Chosen outcome	
Reason and evidence	
Owner and approvers	
Review or expiry date	

Primary sources

Law Society: How to use lawtech in your practice

SRA: Effective supervision

SRA: Client care letters

Source status

Links checked 18 August 2026. Confirm the current version and obtain appropriate professional advice before relying on regulated, contractual, privacy, security, insurance, financial or wellbeing conclusions.