










































# MANAGING PARTNER ENGAGEMENT WORKSHEET

Area	Estimated Common Benefit Hours			Engagement Level			
	Weekly	Monthly	Annually	Oversight	Hands On	Shared	NA
 <b>Accounting and Taxes</b>							
 Review financial statements							
 Review general ledger							
 Interface with firm's CPA							
 Manage firm tax matters							
 Interface with key software vendors							
Other (specify)							
<b>Sub-total</b>							
 <b>Finance and Banking</b>							
 Review cash reports							
 Approve credit line draws and paydowns							
 Billings and collections							
 Manage banking relationships							
 Approve cash disbursements and transfers							
 Negotiate credit lines							
Other (specify)							
<b>Sub-total</b>							












# MANAGING PARTNER ENGAGEMENT WORKSHEET

Area	Estimated Common Benefit Hours			Engagement Level			
	Weekly	Monthly	Annually	Oversight	Hands On	Shared	NA
 <b>Marketing</b>							
 Create firm marketing plan							
 Manage individual marketing planning process							
 Marketing systems development (CRM & Automation)							
 Marketing expense approval							
 Marketing policy development							
 Website and digital marketing (blogs, newsletters, video, etc.)							
 Manage key outsourced marketing relationships							
 Firm functions and events							
 Internal meetings and reporting							
 Public relations							
 Review KPIs and institute corrective action							
Other (specify)							
<b>Sub-total</b>							
 <b>Human Resources</b>							
 Salary administration - professional and staff							
 Benefit administration (health, life, disability, 401K, etc.)							













# MANAGING PARTNER ENGAGEMENT WORKSHEET

Area	Estimated Common Benefit Hours			Engagement Level			
	Weekly	Monthly	Annually	Oversight	Hands On	Shared	NA
 Staff review process							
 Hires, terms and counselling							
 Partner conflicts							
 Policy and procedure enforcement							
 Policy manual							
Other (specify)							
<b>Sub-total</b>							
 <b>Technology</b>							
 Software applications							
 Network infrastructure							
 Desktop and mobile appliances							
 System access management							
 Data and network security and backup							
 In-house resource management							
 Outsourced resource management							
Other (specify)							
<b>Sub-total</b>							
















# MANAGING PARTNER ENGAGEMENT WORKSHEET

Area	Estimated Common Benefit Hours			Engagement Level			
	Weekly	Monthly	Annually	Oversight	Hands On	Shared	NA
 <b>Facilities and Office Services</b>							
 Office and seating assignments							
 Leasehold management and landlord relationships							
 Records management							
 Disaster planning							
 Office ergonomics and environmental factors							
Other (specify)							
<b>Sub-total</b>							
 <b>Major Purchase Management</b>							
 Furniture and equipment							
 Information Technology							
 Outsourcing agreements							
 Contracts, Leases, and purchase agreements							
Other (specify)							
<b>Sub-total</b>							












# MANAGING PARTNER ENGAGEMENT WORKSHEET

Area	Estimated Common Benefit Hours			Engagement Level			
	Weekly	Monthly	Annually	Oversight	Hands On	Shared	NA
 <b>Attorney Performance</b>							
 Practice planning process							
 Training programs and CLE administration							
 Non performance issues							
 Workload distribution							
 Review KPIs and institute corrective action							
Other (specify)							
<b>Sub-total</b>							
 <b>Partner Issues</b>							
 Partner performance issues							
 Partner relationship issues							
 Partner and staff relationship management							
 Partner policy and procedure enforcement							
 Origination management							
Other (specify)							
<b>Sub-total</b>							

# MANAGING PARTNER ENGAGEMENT WORKSHEET

Area	Estimated Common Benefit Hours			Engagement Level			
	Weekly	Monthly	Annually	Oversight	Hands On	Shared	NA
 <b>Legal Compliance and Risk Management</b>							
 Insurance coverages (CGL, Cyber, E&O, EPL, Fiduciary, ERISA Etc.)							
 Licensing and permitting							
 Retention letters							
 Contingent liabilities							
 Contingent fee agreements							
 Debt exposure firm and partner levels							
 Conflicts of interest							
 Risk management policies and procedures							
Other (specify)							
<b>Sub-total</b>							
 <b>Client Service</b>							
 Review KPIs and institute corrective action							
 Client satisfaction tools and measurement							
 Dispute resolution							
 Client service training and education							
 Regular client service meetings							
Other (specify)							
<b>Sub-total</b>							

# MANAGING PARTNER ENGAGEMENT WORKSHEET

Area	Estimated Common Benefit Hours			Engagement Level			
	Weekly	Monthly	Annually	Oversight	Hands On	Shared	NA
 <b>Cost Control and Profitability</b>							
 Review KPIs and institute corrective action							
 Cost control policies and enforcement							
 Setting profit targets							
 Billing rate and realization management							
 Write off management							
 Alternative fee agreements							
Other (specify)							
<b>Sub-total</b>							
 <b>Partners Compensation</b>							
 Process management (data collection, formula preparation, input)							
 Partner pay and incentives (if an MP duty)							
 Partner pay recommendations (if an MP duty)							
Other (specify)							
<b>Sub-total</b>							

# MANAGING PARTNER ENGAGEMENT WORKSHEET

Area	Estimated Common Benefit Hours			Engagement Level			
	Weekly	Monthly	Annually	Oversight	Hands On	Shared	NA
 <b>Lateral Hiring and Recruiting</b>							
 Lateral vetting and process management							
 Lateral economic analysis							
 Lateral offers and agreements							
 Recruiting policy and process							
 Recruiting events							
 Recruiter relationships							
Other (specify)							
<b>Sub-total</b>							
 <b>Strategic Planning</b>							
 Plan development							
 Process management							
 Consultants							
 Retreat planning and preparation							
 Plan execution							
 Transition planning (if applicable)							
Other (specify)							
<b>Sub-total</b>							



# MANAGING PARTNER ENGAGEMENT WORKSHEET

Area	Estimated Common Benefit Hours			Engagement Level			
	Weekly	Monthly	Annually	Oversight	Hands On	Shared	NA
 <b>Branch Office Management and Development</b>							
 Branch office management and administration							
 New branch office development							
 Branch office visits							
Other (specify)							
<b>Sub-total</b>							
<b>TOTAL</b>							