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Anchor Point LLC

Delegation Readiness Assessment

EVALUATE YOUR FIRM'S OPERATIONAL INFRASTRUCTURE

Delegation Readiness Assessment

HOW TO USE THIS ASSESSMENT

Rate Each Statement from 1 to 5

For each statement below, score your firm from **1 (Strongly Disagree)** to **5 (Strongly Agree)**. Be honest — this assessment is most valuable when it reflects reality, not aspiration. Complete all four sections, then total your score to identify where your firm's operational infrastructure is strong and where it needs to be built before delegation can work safely.

SECTION 1 OF 4

Process Clarity

STATEMENT	SCORE (1–5)
Key operational processes — billing, intake, case management, trust accounting — are documented in writing and accessible to the team.	☐ / 5
Roles and responsibilities for every major function are clearly defined. Every team member knows what they own.	☐ / 5
Team members know exactly what a successful outcome looks like for their tasks — not just what to do, but what "done correctly" means.	☐ / 5

SECTION 1 SCORE — PROCESS CLARITY ___ / 15

SECTION 2 OF 4

Controls & Visibility

STATEMENT	SCORE (1–5)
Leadership receives regular, accurate KPI reports without having to ask for them. The information arrives on a predictable schedule.	☐ / 5
Structured review checkpoints exist for critical work — billing, trust accounts, matter status — before issues reach the client.	☐ / 5
Operational problems are consistently identified internally before clients notice them. The firm catches its own mistakes.	☐ / 5

SECTION 2 SCORE — CONTROLS & VISIBILITY ___ / 15

SECTION 3 OF 4

Team Readiness

STATEMENT	SCORE (1–5)
Employees have the specific skills and training needed to own delegated work — not just the willingness, but the demonstrated capability.	☐ / 5
Standardized training materials exist for all recurring firm processes. New team members can be onboarded without relying on tribal knowledge.	☐ / 5
Team members clearly understand the limits of their decision-making authority. They know when to act independently and when to escalate.	☐ / 5

SECTION 3 SCORE — TEAM READINESS ___ / 15

SECTION 4 OF 4

Leadership Mindset

STATEMENT	SCORE (1–5)
I am comfortable allowing others to own outcomes — even when their method differs from how I would do it, as long as the result meets the standard.	____ / 5
I focus my time on maintaining visibility into the firm's operations rather than direct involvement in individual tasks.	____ / 5
I trust the firm's operational systems as much as I trust individual effort. When a system works, I don't feel the need to verify it personally.	____ / 5

SECTION 4 SCORE — LEADERSHIP MINDSET ___ / 15

TOTAL READINESS SCORE

_____ / 60

Add your four section scores to determine your firm's overall delegation readiness and identify the highest-priority areas for improvement.

Interpreting Your Score

45 – 60 Points

STRONG DELEGATION FOUNDATION

Your firm has the operational infrastructure required to scale. You have moved beyond task-level management and built systems that provide visibility and control. Your focus should be on continuous improvement, refining your control points, and developing the next layer of firm leadership. The infrastructure is there — now build the people who will run it.

30 — 44 Points

MODERATE READINESS — STRENGTHEN CONTROLS AND VISIBILITY

You are likely experiencing the tension between growth and control. Some processes work well, but you probably still serve as the bottleneck for critical decisions. Review your lowest-scoring section — that is where the infrastructure gap is most acute. Focus on building better visibility dashboards and formalizing the control points that currently exist only in your head. Delegation is possible, but it requires a more deliberate infrastructure investment first.

Below 30 Points

INFRASTRUCTURE REQUIRED BEFORE DELEGATION CAN WORK

Your firm is highly dependent on your direct involvement, and attempting to delegate in this environment will likely result in dropped balls, inconsistent outcomes, and frustration for everyone involved. This is not a reflection of your team's capability — it is a reflection of the systems that have not yet been built. Before increasing delegation, focus on three things: document the critical processes, define clear ownership for each function, and establish at least one reporting mechanism that gives you visibility without requiring your direct involvement.

NEXT STEP

Build the Infrastructure That Makes Delegation Safe

If your assessment revealed gaps in process clarity, controls, or visibility, Anchor Point can help. We work with law firm leaders to design and implement the operational infrastructure that makes delegation not just possible —— but reliable. From documented workflows and KPI dashboards to billing controls and trust account governance, we build the systems that give you the confidence to lead strategically.

SCHEDULE A CONVERSATION

Anchor Point LLC

Kansas City, Missouri

scott@anchorpointsolutions.com

anchorpointsolutions.com

Fractional CFO & COO Services for Law Firms