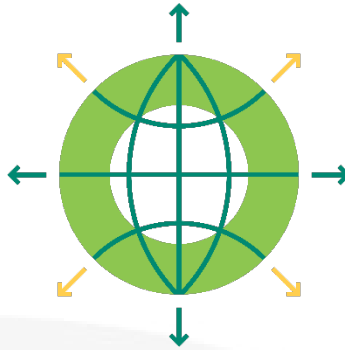


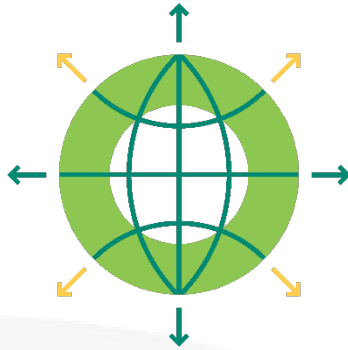
Virtual Practice Playbook Series: Quick Assessment Tool



Client Experience

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Our evolving strategic plan incorporates the client experience as a key pillar of focus.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We are utilizing more frequent client interactions to improve client relationships.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have a clear vision for the client services skills of our professional staff in a remote work environment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In this new normal, our most important clients find it easy to do business with us.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
What are your top priorities to sustain client loyalty?					

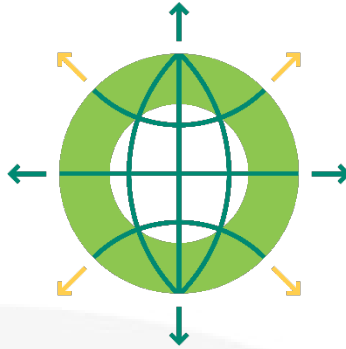
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Leadership & Management

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Our leaders are coordinating and communicating so that team members are aligned, informed around work priorities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We are using virtual tools and technologies to seamlessly manage our workflow and reduce bottlenecks.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our leaders use a variety of practices that keep team members connected and engaged.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our leaders and teams have effective methods in place to create and sustain a healthy work load balance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Leaders and teams have developed effective ways to hold each other accountable remotely.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

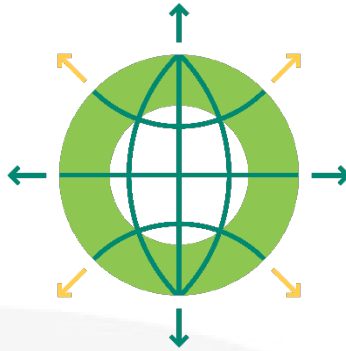
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Talent Management

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
We can deliver a virtual onboarding experience that effectively welcomes, trains, and connects new employees to our team.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our team members have the right amount of coaching and feedback they need to be successful in this environment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We are tracking how culture is doing and taking action to keep it strong in a virtual environment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We are adjusting our roles and responsibilities (interns, managers, experts, etc.) to adjust to a virtual environment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We deliver remote learning and training experiences using a variety of methods.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Virtual Practice Playbook Series: Quick Assessment Tool



Marketing & Development

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Our organization has a concise, well-communicated strategy to compete for business in this new, virtual world.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In an industry so reliant on face-to-face relationships, our organization knows what it wants our virtual client relationships to look like.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our organization knows what makes it stand apart from other firms and communicates this clearly to its clients – internal, external, past, present, and future.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We know what a marketing culture is, what it means to our firm, and have created and implemented a measurable one.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We are delivering expert content to our clients on a very regular basis to solidify our status as trusted advisor and industry expert.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>