



COACHING FOR LAWYERS

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“Lawyer’s Life” Assessment Test

Here is an assessment tool to help you evaluate your professional life and your personal life. For each statement, give a score showing how much you agree with the statement, 10 being the highest degree of agreement and 0 being total disagreement. Average the scores for each section. If a statement does not apply to your situation, don’t answer it. Some statements will refer to an individual law practice or a law firm, so answer accordingly.

Daniel Roberts

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I. Professional Life:

Satisfaction:

1. _____ My work is fulfilling. It provides the mental stimulation and emotional gratification I need to be satisfied with how I earn my living.
2. _____ I am very satisfied with my decision to become a lawyer. I have never considered changing careers.
3. _____ I look forward to going to work every day.
4. _____ I feel that my work is important and that what I do makes a difference.
5. _____ I do not work too much. I have plenty of time for my family and my personal life.
6. _____ Stress is not a problem for me. My work is not stressful or I know and use methods to reduce my stress.
7. _____ I keep a good balance between my professional and personal life.
8. _____ I have enough time to comply with deadlines.
9. _____ I am happy with my area(s) of law practice. I have not considered changing the type of law that I practice.
10. _____ I still have enough energy left at the end of the workday to enjoy my personal life.
11. _____ I have all of the education, knowledge and skills I need to be a good attorney.
12. _____ I always do the best job I am capable of doing.
13. _____ I am well respected by my peers and colleagues.
14. _____ Representing the clients I do gives me a great deal of satisfaction.
15. _____ My office/law firm represents the right clients for the right reasons.

_____ **Total for section**

_____ **Average for section**

Profitability:

1. _____ My legal career provides a good living for my family and me. Our needs are well met.
2. _____ My office/law firm's expenses are low. There is not a struggle each month to cover the overhead.
3. _____ I have/my law firm has a marketing plan and follow it faithfully.
4. _____ I have/my law firm has the support staff and technology necessary to get the work out cost effectively.
5. _____ My/my law firm's law practice areas are diversified enough to avoid financial risk.
6. _____ My/my law firm's client base is diversified enough to avoid financial risk.
7. _____ My monthly income is consistently high enough to pay my bills, taxes and other obligations as they become due.
8. _____ I am not underpaid. I make as much or more than my services are worth on the legal market.
9. _____ I am doing everything I can to maximize my income and minimize my expenses.
10. _____ Compared to my peers, I am doing very well financially.
11. _____ My legal fees are priced right.
12. _____ My clients give me repeat business and refer legal business to me.
13. _____ My legal work is always done on time and the invoices go out on schedule.
14. _____ There are at least good 3 reasons why clients should choose my/our law firm over our competition.
15. _____ I/my law firm am constantly aware of our monthly expenses, receivables and work in progress.

_____ **Total for section**
 _____ **Average for section**

Environment:

1. _____ I work with the right people.
2. _____ The atmosphere at my law office/law firm is positive and healthy.
3. _____ There are no petty politics or personality problems to deal with at my office.
4. _____ I have the right people in my support staff.
5. _____ The law office looks professional and I am proud of its appearance.
6. _____ The office environment brings out the best in me.
7. _____ My law firm and I are compatible. We share the same values and philosophy.
8. _____ I really like the people I work with and enjoy being around them.
9. _____ I am happy with my personal office space, desk, chair, equipment and décor. There is nothing I would change.
10. _____ People's personal affairs and problems are handled considerately and appropriately and do not interfere with business.
11. _____ The attorneys and staff in my office give me a feeling of family and shared purpose.
12. _____ The support staff does a great job. No improvement is possible.
13. _____ I get along well with, like and respect the other attorneys in my office.
14. _____ We take time to get to know each other aside from our work roles.

15. _____ Law office administrative functions are handled efficiently and do not waste my time.

_____ **Total for section**
_____ **Average for section**

Productivity:

1. _____ I have all of the books, computers, software and equipment I need to do my work well and be efficient and I know how to use them.
2. _____ My support staff is well trained. There is nothing they need to learn and no skills they need to develop in order to do a better job.
3. _____ I plan my time. I schedule what to do and when to do it and I stick to my plan.
4. _____ I do not procrastinate.
5. _____ I schedule interruption-free time into every workday to do important tasks.
6. _____ I don't waste time.
7. _____ I am clear on what is the highest and best use of my time.
8. _____ I delegate whenever possible.
9. _____ I take the time to train my support staff in how to best support me.
10. _____ I handle the most important tasks first. I handle important tasks before they become urgent-important tasks.
11. _____ I don't over commit.
12. _____ I always under promise and over deliver.
13. _____ I have a system for efficiently handling voicemail and email and I stick to it.
14. _____ I am very good at estimating the time it will take to perform each task.
15. _____ I schedule breaks to keep my energy up.

_____ **Total for section**
_____ **Average for section**

Future Prospects:

1. _____ I am in the right career. I can see myself practicing law until I retire.
2. _____ I am working at the right place. I can see myself working in my present law practice/law firm into the foreseeable future.
3. _____ I am in the right legal practice area. It has a bright future with good income potential.
4. _____ I am on track to make all of the money I want to make in my legal career.
5. _____ I have a plan for my legal career and I am following that plan.
6. _____ I am on a path of professional growth that will give me the knowledge and experience I need to achieve my legal career goals.
7. _____ I stay on track with my plans; I don't just take the easiest path.
8. _____ I am very clear on what I want out of my legal career/law practice and how to achieve it.
9. _____ I keep up with the legal profession; statistics, trends, new practice areas and challenges. I am well informed.
10. _____ I know exactly what is my ideal legal case.
11. _____ I can describe precisely my ideal legal client.

12. _____ I have a system to maintain contact with my former law clients and I use it.
13. _____ I have a network of attorneys and business contacts and I keep in touch with my network.
14. _____ I have constructed a Life Plan and I know exactly how my legal career/law practice fits into the plan and my life goals.
15. _____ I don't do it all alone. I get help from experts to help me achieve my goals.

_____ **Total for section**
 _____ **Average for section**

The top 5 challenges I face in my professional life:

1. _____
2. _____
3. _____
4. _____
5. _____

II. Personal Life:

Relationships:

1. _____ I am very happy and in love with my partner/ I am very happy being single and enjoy my lifestyle.
2. _____ I show my partner how much I love her/him regularly. I enjoy being romantic.
3. _____ My partner loves me and shows it.
4. _____ I am close to my children and there is nothing in the way between us.
5. _____ I spend regular quality time with my children. I spend more than enough time with them.
6. _____ I have a happy and loving family. There are no problems we have not worked through.
7. _____ I enjoy my extended family and in-laws and we get along well.
8. _____ I am loved by the people who mean the most to me.
9. _____ I have plenty of friends; all that I want.
10. _____ I really enjoy my friendships and take the time to cultivate and nurture them.
11. _____ I have 1 or 2 really good friends that I can confide in.
12. _____ I know my neighbors and we get along well.
13. _____ I tell my loved ones that I love them often.
14. _____ I am involved in at least one group aside from work where we share a common interest.
15. _____ There is nothing left undone in my relationships.

_____ **Total for section**
 _____ **Average for section**

Finances:

1. _____ I am not stressed about money.
2. _____ I am following a plan for financial independence.
3. _____ Money comes easily; I don't have to struggle for it.
4. _____ I regularly invest or save a portion of my income.
5. _____ I do not have credit card debt.
6. _____ I am very knowledgeable about money and finances.
7. _____ When I buy, I buy wisely and base my decisions on value and quality.
8. _____ I have enough money saved for at least three months of living expenses.
9. _____ The work that I do provides more than enough money for my needs and wants.
10. _____ I am following an investment plan that will fully fund my retirement needs.
11. _____ I have a budget and I follow it faithfully.
12. _____ I don't buy something unless I love it.
13. _____ I have an excellent credit rating.
14. _____ My work has good prospects for increased income.
15. _____ I do not overspend.

_____ **Total for section**
_____ **Average for section**

Health:

1. _____ I exercise regularly and am in excellent shape for my age.
2. _____ I watch my diet, both the kind and the amount of food I eat.
3. _____ I do not take illegal drugs.
4. _____ I do not smoke.
5. _____ I do not drink excessively.
6. _____ I watch my caffeine intake.
7. _____ I receive regular check ups and medical care.
8. _____ I visit my dentist regularly; my teeth are in great shape.
9. _____ I do not have high blood pressure or high cholesterol.
10. _____ I take vitamins and supplements daily.
11. _____ I get plenty of sleep.
12. _____ I meditate or have some period of quiet reflective time every day.
13. _____ I avoid stress and if it occurs I handle it effectively.
14. _____ I do not put myself at risk for sexually transmitted diseases.
15. _____ There is nothing I am doing to endanger my health.

_____ **Total for section**
_____ **Average for section**

Effectiveness:

1. _____ I delegate whenever possible.
2. _____ I do very few errands.
3. _____ I don't over commit my time.
4. _____ I ask others for help when I need it.
5. _____ I do put first things first.

6. _____ I concentrate my efforts in areas where I have my greatest strengths.
7. _____ I avoid work in areas where I have my greatest weaknesses.
8. _____ I set aside quiet time each day to work on important tasks.
9. _____ I prioritize my tasks.
10. _____ I make sure that I am clear on what to do before I start the job.
11. _____ I know and use the techniques for good decision making.
12. _____ I have the self-discipline to stay focused on my work.
13. _____ I have the tools I need to do the best job in the shortest time.
14. _____ I know and use time management techniques.
15. _____ I don't reinvent the wheel.

_____ **Total for section**
 _____ **Average for section**

Self-Awareness:

1. _____ My personal values are clear and I use them to guide my life.
2. _____ I know myself well and like the person that I am.
3. _____ I have resolved all of my past issues.
4. _____ I know my strengths and my weaknesses.
5. _____ I don't spend time with unpleasant people.
6. _____ I set high standards for myself and live up to them.
7. _____ I don't let people take advantage of me.
8. _____ I have developed my spiritual nature.
9. _____ I tolerate very little.
10. _____ I know my purpose and mission in life.
11. _____ I am at choice as to how to live my life.
12. _____ I know how to get what I want with the least amount of effort.
13. _____ I know exactly what I want out of my life.
14. _____ I have a life plan and am working the plan.
15. _____ I could die today with no regrets.

_____ **Total for section**
 _____ **Average for section**

The top 5 challenges I face in my personal life:

1. _____
2. _____
3. _____
4. _____
5. _____

III. What I have/what I want:

The 10 things in my life I am the most grateful for:

