PRACTICE BUILDER ACADEMY™
Building Your Practice. Re-designing Your Life.™

FILE AUTOPSY: For Old Engagements
AFTER ACTION REVIEW: For Just-Completed Engagements

CLIENT/FILE NAME: ____

Date Started: ___/____/____

Date Ended: ___/____/____

Type of Engagement: ____

Hours Incurred: ________ by _____ _______ by _____ _______ by _____

Total Time: _$_____________

Total Billed: _$_____________

Total Collected: _$_____________

Source of Engagement: ____

If Referred: Thanked? _____________ Gift Sent? _____________

One Minute Brain Dump: the things I most remember about this engagement are …

ABOUT THE CLIENT

1. Did I like the client? Do I want more clients like this? Why or why not?

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2. Did the client like me? Why or why not?

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3. If asked, would the client say their expectations were met?

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4. How would this client describe me to their peers?

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5. What value did I deliver? Where was that demonstrated? Did the client notice?

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6. How could I have served this client better? Is there other consulting work I could do?

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ABOUT THE WORK

7. Did I like the work? Why or why not?

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8. Were there any novel/interesting/intellectually challenging things about the work?

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9. Was I good at it? How could I have been better or done better?

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10. If I liked the work, should I become an expert in this type of work? Why or why not?

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11. If I liked the work, could I build a practice doing just this type of work? How?

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12. If I didn't like this kind of work, how could I do less of it?

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ABOUT THE MONEY

13. Was this a profitable engagement for me to work on? Why or why not?

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14. If I prepared a time budget, was my estimate high or low? Why?

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15. If I provided a fee range to the client, was the estimate within that range? If no, why?

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16. Did anything unexpected happen that increased my time? Did I bill the client extra for that?

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17. Did the client believe my fee was fair? Why or why not?

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18. If I had to quote this type of engagement again, what would I do differently?

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KITCHEN SINK STUFF

19. With 20/20 hindsight, should I have taken on this engagement? Why or why not?

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20. With 20/20 hindsight, were there any "red flags" that I should have noticed?

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21. Did I worry about, or lose sleep over, this engagement? Why?

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22. Did I use any specialized research/reference/software tools? Would I use them again?

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23. Were there any research/reference/software tools that I should have had available?

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24. What appendices/exhibits/schedules/etc. can I use re-use or re-purpose to save me time?

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HOW TO USE THIS TOOL, OR:
What Can You Learn From Your Dead Files?

CSI-pick a city. Bones. Crossing Jordan. Body of Proof. Just a few medical examiner TV shows that I can recall off the top of my head. The docs are all working toward a common goal – determining how their victims lived and died.

Not to be overly dramatic, but we live and die by our engagements. Bet you never thought of it that way. But really, tell me life isn't just peachy when you're working on a fun/interesting/profitable case. And that life doesn't just suck lemons when you're not. Wouldn't it be nice to have more peaches?

Well, if you're interested in (a) identifying the work you love to do, (b) learning how to serve your clients better, and (c) seeing your profits grow you may want to spend some time playing medical examiner.

How to Conduct a File Autopsy

Imagine your old client files on the slab, so to speak. Time to open them up and perform an autopsy. Here's one way to go about it. Pick up a scalpel and ...

1. Grab some old files that have been closed for at least a year. Though you can choose these files randomly, it might work better if you select some you know liked and others that you'd rather never think about again.

2. For each file, complete a file Autopsy with this tool that we created for our Practice Builder Academy members. For this exercise to have value, be brutally honest as you answer questions about:

The client:

- *Did the client like me? Did I like the client?*
- *Were the client's expectations met?*
- *How would this client describe me to their peers?*
- *What value did I deliver? Where was that demonstrated?*

The work:

- *Did I like the work?*
- *Was I good at it? How could I have done better?*
- *If I liked the work, should I become an expert at it?*
- *If I didn't like the work, how can I do less of it?*

The money:

- *Was this a profitable matter for me to work on?*
- *Was my time budget and fee estimate accurate?*
- *Did the client feel my fees were fair?*
- *If I quoted this engagement again, what would I do differently?*

Kitchen sink stuff:

- *With 20/20 hindsight, should I have taken on this engagement?*
- *Were there any red flags I should have noticed?*
- *Did I worry about or lose sleep over this engagement?*
- *Did I produce anything that can be re-used in a future engagement?*

3. Every week, rinse and repeat with a few more files. Make sure you get the thoughts of any staff members who worked on the engagement.

4. Write down the common themes (good or bad) you start seeing.

Post-Mortem Benefits

Once you've performed a bunch of autopsies, you should have a better sense of the work you like to do, the clients you enjoy serving, and alternative ways to price your services. But more importantly, you'll also understand the work you don't like, the clients you don't want, and the pricing mistakes you don't need.

Don't Stop Now

After you've completed the file autopsies on your old engagements, stay current going forward by using the same form as an "After Action Review" on your just-completed projects. Not only will such reviews keep you focused on the work you want, you'll always be looking for better ways to serve your clients and price your services.

Cheers!
Rod Burkert

PS – I want to give credit where credit is due. This tool and accompanying explanation was inspired by Matt Homann. Matt is the founder of LexThink, a legal innovation consultancy that helps lawyers and other professionals find creative ways to grow their businesses and serve their clients better. He is also the author of the legal blog "the [non]billable hour."