

2026 Performance Scorecard

Assess your firm's readiness across Practice, Finance, and Growth

Firm performance starts with clarity. This scorecard helps you measure strengths and uncover gaps across the three pillars of the SurePoint Legal Suite: Practice Solutions, Finance Solutions, and Growth Solutions. Use your results to identify where to focus and the next steps to accelerate success in 2026.



0-8

Early stage

Start building visibility and cohesion across practice, finance, and growth.



9-12

Solid foundation

Focus on aligning all three pillars for maximum impact.



13-17

Your firm is performance-ready

Time to accelerate with the SurePoint Legal Suite.



Practice Solutions

- ☐ Our front- and back-office tools work together within a connected ecosystem
- ☐ We automate billing, timekeeping, and intake workflows
- ☐ Attorneys use intuitive, web-based tools that support productivity
- ☐ We have reduced manual workarounds that slow down client delivery



Finance Solutions

- ☐ We track profitability by client, matter, timekeeper, and practice group
- ☐ Forecasting informs staffing, pricing, and planning decisions
- ☐ Our budgets align with firm-wide KPIs and real-time performance trends
- ☐ Leaders monitor performance in real time
- ☐ We use insights to make proactive decisions



Growth Solutions

- ☐ Compensation is tied to contribution and profitability
- ☐ We use market intelligence and CRM insights to recruit and retain the right talent
- ☐ We support career progression and internal mobility
- ☐ We have visibility into client relationships, outreach, and business development activity
- ☐ Attorneys are engaged in business development activities supported by data



Client & Attorney Experience

- ☐ Clients can view budgets, progress, and invoices digitally
- ☐ We offer flexible fee structures and digital payment options
- ☐ We regularly act on feedback from clients and attorneys
- ☐ Attorneys report ease of use with firm systems

Next Steps

Use your score to identify opportunities in Practice, Finance, and Growth. Then download the full 2026 Planning kit to turn insights into action. Visit surepoint.com to learn how the SurePoint Legal Suite empowers firms to accelerate performance.