
MARKETING THE LAW FIRM

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How to TOOT Your Own Horn: Exceptional Self Evaluations

By Sharon Meit Abrahams

It's that time again. As the year comes to a close many firms are beginning the associate review process. Even if your firm does not have a formal review process I recommend that you write a self-evaluation that outlines your achievements and specifies your goals for the coming year. Because I have worked in law firms for over 25 years I have seen a variety of review processes, and whether or not a self-evaluation is part of your firm's process I want to share a few tips I have learned through the years.

First Things First

You should be familiar of your firm's performance management system. Ask your supervising attorney(s), the professional development department or someone in human resources about the process. There are probably written materials, a slide presentation or a video that explains the steps. Of course, you can ask your colleagues, but they may or may not be fully versed in the details and will share their own opinion of the process. For example, they may think no one reads a self-review so they opt to not complete one. From my experience, not completing a self-review is detrimental when the reviewers begin to formulate their comments.

A self-evaluation is not a recap of the hours you billed or the client matters you worked on. It is an activity in which you look at your progress and development as an attorney. It gives you a chance to comment on the improvements you have made and the skills you have acquired over the past 12 months. You should approach a self-evaluation with the same planning, determination and effort you would put into a client project. There are three goals of the written self-evaluation: 1) to explain your achievements with detail; 2) to comment on the skills you have acquired and those needed to progress; and 3) to clearly articulate your career expectations. Your firm might provide a form to complete, but in case you are doing this on your own the following are the categories and content to include.

Billable Activities

Address your billable work, not in hours, but in what was exceptional or significant about the work. Comment if there was an usual time commitment or sophistication and complexity to the work you did. Make note if you attained substantive expertise or a specialized skilled due to the matter and describe the uniqueness of the results that were achieved. Mention if the work lead to a new client relationship or if you were required to take on supervisory responsibilities for the first time. It is important to state if your hours were considerably above or below requirements and clarify so the reviewers have a full picture of your past year. The key to the self-evaluation is to highlight that you have grown as an attorney during the past 12 months.

Many firms encourage their attorneys to do Pro Bono work so ask if these hours are considered billable equivalent. Whether or not they are added to your billable requirements take the time to explain the project(s). Describe the work, the total hours committed and what you learned, so the attorneys reading your review will see the value you attained from participating in Pro Bono work.

Non-Billable Activities

All the time spent on non-billable tasks add up and your firm might have a stated expectation of those hours. Firms consider this time as an investment in the firm and in an individual's career. A list of the organizations you belong to is not what the firm wants to read. Explain the leadership roles you held or project management skills you acquired through your participation in the organizations and how that translates back to the firm.

Outline business development activities such as giving client presentations, conducting CLE programs or getting published. Explain how these are building your reputation and laying the ground work for future work opportunities. Describe how you have implemented your personal business development plan.

Discuss any activities you have participated in that moves your practice area or department forward like setting up form files or mentoring incoming or lateral associates. Comment on tasks that support the firm such as running the summer program or serving on a firm wide committee.

All firms have a tug of war between billable and non-billable work so be sure to explain how all the additional hours you spend not billing will eventually pay-off in the future.

Professional Development

In the billable and non-billable sections of the self-report you have outlined your achievements while elucidating what you learned the previous 12 months. The Professional Development section is where you articulate your career expectations. If your firm has written competencies start with those, if not, determine the next steps for yourself or speak with your supervising attorney(s). Include the type of work, matters or projects you need to continue building your knowledge and skills. To round out this section also consider adding comments about your primary strengths and practice related, as well as personal, goals.

Sell Yourself

You are creating this document for a reason. It might be to get a bigger bonus or just to let others know you are dedicated and on track for partnership so start with numbers. Try to quantify as much as you can so the firm sees the value you bring through your practice. You might have to ask the accounting department for help so find the right person. Of course the simplest is your hours. If you meet the minimum expectation do not bother to highlight it. Firms see this only as a base and will only reward when the minimum is surpassed. Realization rates are important, no matter what, so if you are above 90% be sure to include it.

To get the most from quantifying the work focus on the following two areas. The first, and easier of the two, is to attain the total value of the client work to the firm. Yes, this will include other attorneys' hours, but your part is still critical to the overall matter. Whether the client work is valued at $50,000 or $5 million state it in a way that highlights how you added to the bottom line. The second is the value of the work to the client. This might be harder to determine, but is worth learning. By value to the client I mean what this work did for the client. Did it save the client money (how much)? Save the family business (what is that worth)? Move product across the country (value of product)? You can be creative in what you want to quantify.

Choose Words Carefully

As you write your report, use certain key words that draw a positive picture. Just like a search on the internet you want words to be associated with you when the decision makers are discussing you. Here are a few effective words to consider:

- **Quality of work:** accuracy, thoroughness, productivity, knowledge base, researching and goal attainment
- **Leadership/management:** goal setting, prioritizing, accessibility, responsiveness, decisiveness, collaboration, and delegation
- **Self-development:** learning, education, advancement, skill building, and career planning

On the flipside be sure to avoid words that are indecisive or considered weak such as, I think …, I believe …, I hope …, or I feel … . Studies have shown that women and diverse attorneys are more likely to play down their successes and use words like "we" instead of "I". Stay focused on yourself and be confident about what you did so use powerful statements:

- I achieved this result …
- I was the lead on …
- I handled the problem …
- I managed client expectations …

Ask for What You Want

In the professional development section or in a summary be clear and state the type of work you need to continue to develop as an attorney in your firm. Ask for specific feedback and constructive criticism so that you know what areas you need to work on. Some firms only offer a summary of all the feedback gathered about an associate, ask for the individual feedback so you can address any issues a certain partner has about you. And most importantly explain if you're being treated differently than others. All associates deserve equal treatment whether it is about work assignments or getting feedback. If you are not getting what you need, ask for it.

Share with Others

Before you submit your self-evaluation have a mentor read it to ensure it is clear and to the point. You can also give it to your practice group leader or office head for their input. This document is not a secret and will be read by a handful of people so there is no harm in asking for their guidance. In fact, by sharing it, you will gain their insight into the content that should be included. If you have no one in the firm to review it, then give it to a family member of friend so you can get objective feedback.

Being self-critical is uncomfortable and no one teaches how to do it a self-supporting fashion. By embracing these tips you are on your way to writing a document that is worthy of attention and respect from those in your firm who will complete your annual performance evaluation.

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