What kind of clients are you working with / on?
What markets and sectors are you prominent in?
What services are you offering to clients?
What are you best known for externally and internally?
What do your clients say about the service and their experience when working with you?

Clients, markets and services

People and culture

How many people do you have?
What do they do? What are the key roles? How are you structured?
How are people effectively led and managed?
How do people feel working for the firm, service line or team?
How would you describe the culture?
How are you supporting the growth and development of the team?

Gro:
thegrogroup.com

Proactive people development planning:
Thinking 3- 5 years ahead

- **Which skills, behaviours and mindsets need to be built ?**
- **What do you need people to be feeling, thinking and doing differently?**
- **What support do you need to give your people to enable them to drive your plans?**

What are your key financial results / measures? (i.e. fees, profit, gross margin, lock-up) and how have these improved in the last few years?
How do you ensure that you capture a good commercial return in return for the value you create for clients?
How are people accountable for effective commercial performance and financial governance?

Financial and Commercial

Operations, systems and processes

How are you structured as a firm, service line, or team?
How do you deliver your services to your clients?
Which technologies are driving your client service?
What processes and systems are managing your people and performance?
How do you drive efficiencies?
How do you innovate?
What non-financial metrics do you use to manage your firm or team?