

The Law Firm Close That Never Really Closes

Fix rolling closes **without** changing software, adding headcount, or extending deadlines.

INSTRUCTIONS

Read each statement and mark **Yes / No / Not Sure**. If “Yes” feels familiar, don’t justify it. A rolling close is a signal—not a flaw.

What “Close” Actually Means

1. Month-end is declared “done,” but numbers still move later.
 Yes No Not Sure
2. Reports change after partners review them.
 Yes No Not Sure
3. Adjustments are normal and expected.
 Yes No Not Sure
4. There’s no single moment everyone agrees the close is final.
 Yes No Not Sure

Where the Close Slips

1. Items roll forward because they’re “not material.”
 Yes No Not Sure
2. Reconciliations happen after reports go out.
 Yes No Not Sure
3. Follow-ups depend on reminders, not ownership.
 Yes No Not Sure
4. Late information forces retroactive fixes.
 Yes No Not Sure

Review & Accountability

1. No one owns the close end-to-end.
 Yes No Not Sure
2. Reviews happen when time allows, not on a fixed cadence.
 Yes No Not Sure
3. Partners spot issues differently each month.
 Yes No Not Sure
4. The same questions come up repeatedly.
 Yes No Not Sure

Operational Drag

1. Staff scrambles near the deadline.
 Yes No Not Sure
2. Close tasks compete with day-to-day work.
 Yes No Not Sure
3. One delay cascades into many.
 Yes No Not Sure
4. “We’ll clean it up next month” is common.
 Yes No Not Sure

Decision Impact

1. Leadership waits for “final” numbers that never fully arrive.
 Yes No Not Sure
2. Hiring, pricing, and distributions get postponed.
 Yes No Not Sure
3. Forecasting relies on partial confidence.
 Yes No Not Sure
4. Decisions feel heavier than they should.
 Yes No Not Sure

How to Read Your Results

1. **0–3 Yeses:** You’re early—but drift is starting.
2. **4–7 Yeses:** You’re running a rolling close.
3. **8+ Yeses:** The close is undermining confidence, not accuracy.

A rolling close doesn’t mean bad books. It means **the close lacks structure, ownership, and a finish line.**

Why This Matters

Law firms don’t need faster closes. They need **decisive closes**. When the close never truly ends:

1. Confidence erodes
2. Decisions slow
3. Risk quietly compounds

A clean close isn’t about speed—it’s about **finality**.

If this checklist described your month-end more than you’d like:

Get clarity on what’s keeping your close open

<https://bluebird-partners.com>

No prep. No pitch. Just alignment.