

The Law Firm Ops Red Flags Checklist

Spot operational risk **without** adding headcount, changing software, or creating more meetings.

INSTRUCTIONS

Read each statement and mark **Yes / No / Not Sure**.
If a red flag feels familiar, don't overthink it.
This is about visibility, not blame.

	Yes	No	Not Sure
Leadership & Ownership <ol style="list-style-type: none"> 1. Work stalls because no one clearly owns the next step. 2. Decisions default to a partner “just to be safe.” 3. Important tasks live in email threads instead of systems. 4. Team members wait for approval that isn't actually required. 			
Intake & Handoffs <ol style="list-style-type: none"> 1. Intake asks the same questions more than once. 2. Conflict checks slow momentum instead of protecting it. 3. Engagement letters sit unsigned longer than expected. 4. Matters start before scope and roles are fully clear. 			
Active Matters <ol style="list-style-type: none"> 1. Work pauses while waiting on documents or answers. 2. Staff is unsure what's urgent versus “nice to have.” 3. Partners review work twice because standards aren't clear. 4. Status updates happen reactively, not on a cadence. 			
Operations & Flow <ol style="list-style-type: none"> 1. Processes exist informally, not in writing. 2. Fixes are handled case-by-case instead of system-wide. 3. The same issues resurface month after month. 4. Team members create workarounds to “just get it done.” 			
Billing & Close <ol style="list-style-type: none"> 1. Invoices go out later than planned. 2. Adjustments happen after bills are sent. 3. Matters feel finished but never fully close. 4. Month-end is technically done — but still changing. 			

Soft Qualifier

1. **0–3 red flags:** You're early, but pressure is building.
2. **4–7 red flags:** The firm is running on informal systems.
3. **8+ red flags:** Growth is being constrained by operations, not effort.

Red flags don't mean failure.
They mean your firm has **outgrown how work currently moves**.

Why This Matters

At a certain size, law firms don't break — they **fray**. The risk shows up as:

1. Partner overload
2. Staff frustration
3. Slow decisions
4. Quiet financial drag

Catching red flags early prevents reactive fixes later.

If this checklist surfaced issues you've been feeling but couldn't name:

Book a 15-minute operational clarity check

<https://bluebird-partners.com>

No prep. No pitch. Just alignment.