

CLICKOAI LAW FIRM GUIDE 26 OF 63

OKRs and KPIs for Mid-Sized Law Firms

Choose measures that change decisions without rewarding noise.

Use it when

a firm is designing objectives, key results or KPIs

Boundary

This is an operating aid, not financial, employment or performance-management advice.

Built for independent law firms in England and Wales

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1. Frame the decision

A useful goal has a baseline, owner, data source and decision rule. Activity must not hide quality loss.

Specific focus

Separate outcome, process indicator and non-negotiable quality floor.

Questions to answer

- For this guide: Separate outcome, process indicator and non-negotiable quality floor.
- What outcome changes?
- What is baseline?
- Who owns source data?
- What action follows result?

Avoid

- target without baseline
- measure no one can reproduce
- optimising speed while quality falls

2. Control sheet

Treat a blank evidence field as a reason to pause, not a reason to guess. Record sources and owners before changing the workflow.

Area	Evidence to collect	Pass condition
Outcome	Change and beneficiary	Specific and bounded
Baseline	Value, date and source	Reproducible
Measure	Formula and frequency	No hidden denominator
Guardrail	Quality or risk floor	Cannot hide harm
Decision	Threshold and action	Changes behaviour

Fail closed	If an input, owner or approval is missing, record the gap and keep the affected step outside the proposed change.
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3. Working record

Complete this page with counts, dates and named sources. Do not include client names, matter names, contract text or privileged material.

Field	Evidence or answer
Guide focus	Separate outcome, process indicator and non-negotiable quality floor.
Objective	
Baseline	
KPI or result	
Data source	
Guardrail	
Owner and date	

Evidence quality check

- The source is named and dated.
- An estimate is labelled as an estimate.
- The owner can reproduce the measure.
- The same method can be used after a change.

4. Decision record

Select the outcome that the evidence supports. A stop or no-change decision is valid.

- Stop: a required source, owner or approval is missing.
- Fix: repair the underlying route before adding technology or cost.
- Test: run one bounded change with a baseline and review date.
- Proceed: adopt only the option supported by the recorded evidence.

Decision field	Record
Chosen outcome	
Reason and evidence	
Owner and approvers	
Review or expiry date	

Primary sources

[Law Society: How to use lawtech in your practice](#)

[SRA: Effective supervision](#)

[SRA: Client care letters](#)

Source status

Links checked 18 August 2026. Confirm the current version and obtain appropriate professional advice before relying on regulated, contractual, privacy, security, insurance, financial or wellbeing conclusions.