

Firm Vivid Vision Discovery Worksheet

Before You Begin: Your goal is paint a clear, specific picture of what your firm will look like in 3 years. Avoid generalities like “excellent client service” or “top-notch team.” Instead, describe what that actually looks like—in behavior, systems, culture, and outcomes. Be bold and have fun! Your answers here will shape your Small Firm Dashboard & quarterly priorities.

Start With Your Why

Reconnect with the reasons you chose this path. These answers form the foundation of your future vision.

1. Why did you start your law firm? What were you trying to create, fix, avoid, or improve?

2. When you first started, what parts of running your own business excited you the most? What felt promising or full of potential?

3. What did you think owning a law firm would allow you to do that you’re not doing today? Why not? This is the gap you’re about to close.

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Reputation, Clients, and Team

Imagine it is 3 years from now. Look at your business in its ideal form.

6. What is your firm's reputation three years from now? What are you known for in your market or community? (Ex: fastest resolution times, best client communication, unique niche expertise, trauma-informed approach.)

7. Describe your team.

- Who's on it?
- What roles exist?
- What skills, attitudes, or behaviors define them?
- What is the culture or "vibe"?
- What do you do intentionally to nourish your team's energy and development?

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Marketing + Leadership

Imagine it is 3 years from now. Look at your business in its ideal form.

8. Three years from now, how do you attract the right clients? Which marketing channels work? What messaging resonates? What referrals come your way automatically?

9. Who leads the team, and what makes that leadership effective? Whether it's you or someone else, describe the qualities, habits, and presence that make a difference.

Then answer for yourself:

What does great leadership look like from you three years from now?

What are you doing more of? Less of? Not at all?

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Client Experience, Operations, Technology and AI

Imagine it is 3 years from now. Look at your business in its ideal form.

10. Describe your ideal client experience—from first contact to final invoice. What makes it feel intentional and distinctively your firm? What does a client say at the end that proves the experience worked?

11. What does your work atmosphere feel like? Describe the environment, norms, and rhythm of the firm.

12. How do operations and technology support your team? List key systems, workflows, automations, or AI-driven improvements that have elevated the business. (Be concrete: drafting automation, AI-assisted intake, templated communication, dashboarding, etc.)

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Impact, Profit, and Anything Else That Matters

Imagine it is 3 years from now. Look at your business in its ideal form.

13. What impact does your firm have on your community, clients, niche, or industry? Think beyond cases—what changes because your firm exists?

14. What numbers matter most in three years? Describe the financial picture that represents a healthy, stable firm (pick the ones that matter to you):

Revenue / Profit / Owner pay / Reserves / Benefits / Investments / Time off / Capacity

15. What services, clients, or habits will your firm not do anymore? Where are you intentionally drawing the line?

16. Are there other aspects of your business that matter and haven't been named yet? Capture anything still in your head.