

velocity work. mastery group.

2022-Annual Planning Retreat

December, 2021

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PREP

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ACTION ITEMS

	TO DO / ACTION	OWNER	DUE DATE	STATUS
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
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11.				
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19.				
20.				

DETERMINE YOUR AVERAGE REVENUE PER CASE/MATTER

Calculate your firm's Average Revenue per matter/case for each practice area and/or revenue stream.

Flat Fee: $[\text{Firm Rev}]/[\# \text{ of matters/cases}]$

Contingency: $[\text{closed case revenue}]/[\# \text{ of closed cases}]$

Hourly billing: $[\text{closed case revenue}]/[\# \text{ of closed cases}]$

NOTE: If you are having trouble getting accurate information to calculate the average rev per matter/case using above formulas, then just do this to get a reasonably close estimate:

$[\text{Last 12 months revenue}]/[\# \text{ of new cases/matters}]$ Try to get at least 12 months of data if you're going to go this route to calculate average revenue per case/matter

Calculated Average Revenues

Practice Area 1:

Practice Area 2:

Practice Area 3:

Firm-Wide:

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Q4 REVIEW

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Q4 GOALS AND ROCKS REVIEW

ROCK NAME	STATUS

WHAT'S THE GAP?

Calculate the gap by subtracting your YTD info from your annual goal.

GOAL	ANNUAL GOAL	-	YEAR TO DATE	=	GAP
Revenue		-		=	
		-		=	
		-		=	
		-		=	

NEXT STEP: If you have different practice areas or revenue streams, use space below to calculate the percentage of revenue that each has contributed year-to-date.

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GOALS

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2022 GOALS

GOAL: REVENUE

2022	Q1	Q2	Q3	Q4

GOAL:

2022	Q1	Q2	Q3	Q4

GOAL:

2022	Q1	Q2	Q3	Q4

GOAL:

2022	Q1	Q2	Q3	Q4

QUARTERLY BREAKDOWN

GOAL: REVENUE

Q1	JANUARY	FEBRUARY	MARCH

GOAL:

Q1	JANUARY	FEBRUARY	MARCH

GOAL:

Q1	JANUARY	FEBRUARY	MARCH

GOAL:

Q1	JANUARY	FEBRUARY	MARCH

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ROCKS

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ROCKS, PEBBLES, SAND

ROCKS

Rocks are big projects that will propel you towards your goals.

Rocks are the things that if you don't get them done, it will push you back.

ROCK GUIDELINES:

- Rocks are set quarterly.
- Rocks are specific.
 - It must be extremely clear how you'll know when they are complete.
- Rocks have a deadline.
- Rocks do not change.
- Rocks cannot be added after execution has begun.

PEBBLES

Pebbles are small to medium projects that need to get done, but probably not by you.

SAND

Sand is considered all the little things that take up your time and do not get you any closer to your goals.

Q1 ROCKS

QUARTERLY ROCKS	WHO
1)	
2)	
3)	
4)	
5)	
6)	
7)	

OTHER IMPORTANT INITIATIVES (That I'd like set in motion by my team)	WHO
1)	
2)	
3)	
4)	
5)	
6)	
7)	
8)	

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INTEGRATION

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GRAB YOUR VISION DECK AND FILL IN BASED ON ALL THE PLANNING YOU JUST DID



VISION DECK

ANNUAL + Q1 PLANNING WORKSHOP

[Law Firm Name]
[What You Are Aiming For?]

2022 GOALS		☀️ Q1				Q2			Q3			Q4		
NAME	GOAL (#)	QUARTERLY GOAL (#)	Q1 GOALS BROKEN DOWN BY MONTH			QUARTERLY GOAL (#)			QUARTERLY GOAL (#)			QUARTERLY GOAL (#)		
			JANUARY	FEBRUARY	MARCH									

Q1 ROCKS

- 1
- 2
- 3
- 4
- 5
- 6

THE WEE THINGS THAT MATTER

STRATEGIES FOR WHEN YOU EXPERIENCE FEAR, DOUBT, DISAPPOINTMENT, OR A LACK OF MOTIVATION

- Submit a coaching topic to: members@velocitywork.com
- post in the **Mastery Group** Facebook Group for ideas and/or support

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ACTION ITEM SUGGESTIONS

	TO DO / ACTION	STATUS
1.	Update metrics tracker	
2.	Hang Vision Deck somewhere I see it every day	
3.	Finish deconstructing all rocks	
4.	Calendar support to keep me on track (coaching calls, team meetings, delegation blitzes, rest/leisure time)	
5.	Calendar focus time for Rocks	
6.	Submit Rocks plus my Wee Thing	
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