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Taghavi Immigration Law

Quarterly Retreat Debrief
September 8, 2023

Contents

Check-In + Review

Check-In

Personal
- Spent 6 weeks abroad
- Signed up for an art class
- Going well w/ Sali

Professional
- Experience you gained by hiring an attorney
- Hired PT legal secretary in Richmond office
- See Revenue every Wednesday + Friday ←----AWARENESS

Goals for the Day
- Get a grasp on #s
- Execution plan for projects

Quarter Review

Accomplishments

- Exceeded goals in June
  - Coming off last event

Lessons Learned + Realizations

- Instability is the reason why July/August goals not met
- *"Work doesn't love you back."*
- Part time assistant is needed
- Need to have a plan to "turn it around" mentally + reach out on Voxer
- **In order to meet the firm goals, every team member must have clear expectations and there must be a process for checking in on expectations being met - and consequences if not.**

Rock Reconciliation

1. **Follow Employment Based Growth Plan** (Soulmaz)- Not Completed

2. **Hire Attorney** (Soulmaz) - Done

3. **Hire Admin** (Soulmaz) - Done

4. **Data sorted and centered** (Soulmaz) - Not Completed
   - Time tracking
   - List for Keenan
   - KPI's reporting
   - Scorecard meetings except for revenue
   - Comfortable with Airtable

Goal Review

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2023 GOALS

	NAME	GOAL ($ or #)
GOAL	REVENUE	$1,500,000

BY PRACTICE AREA

USCIS	
EOIR	
EAD	

GOAL

BY PRACTICE AREA

GOAL

GOAL

JUNE - AUGUST

QUARTERLY ACTUAL ($ or #)	ACTUALS BROKEN DOWN BY MONTH		
	JUNE	JULY	AUGUST
$211,301	$82,900	$64,231	$64,170

BY PRACTICE AREA

NOT ENOUGH DATA	$27,550	NO DATA	NO DATA
NOT ENOUGH DATA	$24,987	NO DATA	NO DATA
NOT ENOUGH DATA	$2,800	NO DATA	NO DATA

BY PRACTICE AREA

SEPTEMBER - NOVEMBER

QUARTERLY GOAL ($ or #)	GOALS BROKEN DOWN BY MONTH		
	SEPTEMBER	OCTOBER	NOVEMBER
$300,000	$100,000	$100,000	$100,000

BY PRACTICE AREA

Upcoming month to be calculated at the end of each month ⌄

	$29,000		
	$14,500		
	$7,250		

BY PRACTICE AREA

DECEMBER - FEBRUARY

QUARTERLY GOAL ($ or #)	GOALS BROKEN DOWN BY MONTH		
	DECEMBER	JANUARY	FEBRUARY
$350,000			

BY PRACTICE AREA

BY PRACTICE AREA

MARCH - MAY

QUARTERLY GOAL ($ or #)	GOALS BROKEN DOWN BY MONTH		
	MARCH	APRIL	MAY
$600,000			

BY PRACTICE AREA

BY PRACTICE AREA

NOTES

Need to redistribute June-August $40,000 gap

VISION DECK

SEPTEMBER - NOVEMBER GOALS

GOAL NAME	GOAL ($ or #)	GOALS BROKEN DOWN BY MONTH		
		SEP	OCT	NOV
GOAL REVENUE	$300,000	$100,000	$100,000	$100,000

UPCOMING MONTH TO BE CALCULATED AT THE END OF EACH MONTH ∨

BY PRACTICE AREA

USCIS		$29,000		
EOIR		$14,500		
EAD		$7,250		

GOAL

BY PRACTICE AREA

GOAL

GOAL

ROCKS

1 **Convert or withdraw 120 EOIR cases by September 30th** (Soulmaz)

2 **Hire an EA** (Soulmaz)

3 **Build KPI dashboard** (Marcelo)

NOTES

DAILY REMINDERS

- *"Work doesn't love me back."*
- All-in isn't about time, but energy.
- What would $5M Soulmaz do?

STRATEGIES FOR WHEN OFF TRACK

- Journal
- Vox Velocity Work

OTHER IMPORTANT INITIATIVES

- Implement deals/invoice/CRM board
- Spend one hour a week on closing project (Melissa)
- Fire Yalda 9/18 (putting myself first)
- Restructure mother's duties to Gusto, 401k, and health benefits

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Rocks

Rocks

1. Convert or withdraw 120 EOIR cases by September 30th (Soulmaz)

2. Hire an EA (Soulmaz)
   - Build plan for duties, responsibilities and expectations

3. Build KPI dashboard (Marcelo)

Other Important Initiatives

1. Implement Deals/Invoice/CRM Board

2. Spend one hour a week on closing project (Melissa)

3. Restructure Mother's duties to Gusto, 401k, and health benefits

4. Fire Yalda 9/18 (putting myself first)