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Jeff Lewis Law

Quarterly Retreat Debrief

October 4, 2023

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Check-In

Check-In

Jeff

Personal

- More time on hobbies
- Less time working on the weekend
- Implemented *Buy Back Your Time* email management
- Walking new puppy!

Professional

- Brought in some interesting cases
- Retained Kyla through probation
- Weathered Renee salary issue
- Exceeded last year's gross (Last year's total gross was \$716K - already hit that)
- Reduced interest expense through credit line vs. high interest credit card

Goals for the Day

- Getting help operationally & getting more in touch with the business
- Developing guidelines to be less anxious and more trusting of my staff

Quarter Review

Accomplishments, Lessons Learned, Realizations

Accomplishments

- Getting credit line in place
- Weathering the Renee issue
- Got a webinar done
- Scheduled an in-office networking event with a politician running for Judge
- Completed first in-person MCLE lecture

Realizations & Lessons Learned

- Realization: Got a collections problem - need to stay more in touch with collections
 - Lesson Learned: Make sure Jason always has and maintains Evergreen retainers
 - Lesson Learned: Jeff needs to read bookkeeping reports and take action
- Realization: Combination of Lyla and email management has helped tremendously - freed up so much time.
 - Lesson Learned: Sometimes I need to just go for it and trust it is going to work out in terms of staffing

Rock Reconciliation

Company Rocks

- 1 Shepherd weekly "Jeff's hours" meeting **(Jason) Not Done**
 - Fridays at 3:30
- 2 Find the missing producer hours for Renee **(and Kyla) (Jason) (?)**
- 3 Fully train Lila on all Intake responsibilities **(Jason) Not Done (?)**

Other Important Initiatives

- 1 Survey about Feedback **(Unkonwn)**

Goals

Q4

GOAL NAME	GOAL (\$ or #)	Q4 GOALS BROKEN DOWN BY MONTH		
		OCTOBER	NOVEMBER	DECEMBER
REVENUE	\$234,000	\$78,000	\$78,000	\$78,000

BY PRACTICE AREA

Jeff Hours	150	50	50	50
Other Attorney Hours	282	94	94	94
Jeff Production	\$114,000	\$38,000	\$38,000	\$38,000
Other Attorney Production	\$114,000	\$38,000	\$38,000	\$38,000

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BY PRACTICE AREA

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Q4 ROCKS

1 Zero Missed Cuddles (Jason)

2 Leads all and misses no more than one huddle a month (Jason)

3 Develop a collections system (Jason)

4 Train Lila (Jeff)

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IMPORTANT REMINDERS

- Report on Rock Progress at the top of the cuddle, talk about each goal set (income by producer, hours by producer)
- Develop system for #Service Channel and for client channels
- Lila to take new initiative to put in Jeff’s hours

STRATEGIES FOR WHEN OFF TRACK

INTERNALLY OFF TRACK	EXTERNALLY OFF TRACK

2023 VISION DECK

JEFF LEWIS LAW

[Law Firm Name]

2023 GOALS		Q1				Q2				Q3				Q4			
NAME	GOAL (\$ or #)	QUARTERLY ACTUALS (\$ or #)	Q1 ACTUAL BROKEN DOWN BY MONTH			QUARTERLY ACTUALS (\$ or #)	Q2 ACTUAL BROKEN DOWN BY MONTH			QUARTERLY ACTUALS (\$ or #)	Q3 ACTUAL BROKEN DOWN BY MONTH			QUARTERLY GOALS (\$ or #)	Q4 GOALS BROKEN DOWN BY MONTH		
			JANUARY	FEBRUARY	MARCH		APRIL	MAY	JUNE		JULY	AUGUST	SEPTEMBER		OCTOBER	NOVEMBER	DECEMBER
REVENUE	\$1M	\$203,990	\$49,457	\$83,997	\$70,536	\$327,517	\$63,421	\$80,488	\$183,608	\$185,018	\$56,790	\$65,806	\$62,422	\$234,000	\$78,000	\$78,000	\$78,000
BY PRACTICE AREA		BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA			
Jeff Hours	629	167	43	55	68	173	43	71	61	146	41	36	69	150	50	50	50
Other Attorney Hours	1128	277	86	81	90	215	56	68	91	229	87	65	77	282	94	94	94
Jeff Production	\$502,880	\$120,582	\$30,613	\$39,405	\$50,564	\$128,491	\$30,615	\$52,325	\$45,551	\$124,760	\$31,044	\$36,428	\$57,288	\$114,000	\$38,000	\$38,000	\$38,000
Other Attorney Production	\$451,200	\$96,891	\$33,095	\$29,214	\$44,000	\$84,290	\$22,090	\$26,000	\$36,200	\$91,660	\$34,660	\$26,040	\$30,960	\$114,000	\$38,000	\$38,000	\$38,000
BY PRACTICE AREA		BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA			

NOTES

Q3 - Kyla effective hourly rate is \$400/hr

Jeff effective hourly rate is \$774/hr

Rocks

Rocks

Company Rocks

- 1 Zero missed cuddles (**Jason**)
- 2 Leads all and misses no more than one huddle a month (**Jason**)
- 3 Develop a collections system (**Jason**)
 - Run Clio AR report weekly
 - Run trust account report weekly
 - Ensure new retainer agreements have Evergreen provision
 - Audit current retainer agreements to ensure there is Evergreen provision
 - Renegotiate with clients that don't have an Evergreen provision
 - Amend all retainer agreements without Evergreen provision
 - Develop weekly email client reminder with a link to pay
 - Weekly collections meeting (Muddle?) (until collections is under control)
 - Terminate relationship clients that have no expectation of collecting
- 4 Train Lila - (Jeff)
 - Celebrations (birthdays, anniversaries, lunches, etc) Renee + Lila
 - Retainer agreements
 - Documents from trial counsel
 - Closing files
 - Testimonials

Other Important Initiatives

Other Important Initiatives

- 1 Report on Rock progress at the top of the cuddle, talk about each goal set (income by producer, hours by producer)
- 2 Develop system for #Service Channel and for client channels
- 3 Lila to take new initiative to put in Jeff's hours

Future Rock Ideas

- 1 Plug in to Provisors
- 2 Surgical Social media marketing
- 3 SLAPP Podcast
- 4 Pew Pew Sue YouTube channel
- 5 Interview/video game YouTube channel
- 6 Spend more time on LinkedIn

NOTES

- 1 **Jason** about managing in Slack - vs @someone in general channel - Jeff gives out a task - need feed back or an emoji
- 2 **Jason** about Renee - maybe we talk to her about going to another firm if she wants to be in a certain financial place. Gently - "if you want that go get it."
- 3 Also express that **Jeff** is so grateful to **Jason** for leading the conversation with Renee
- 4 **Jason** - weekly trust account report and figuring out what do with collections 1-90 days.
- 5 **Jason** - Survey about Feedback (Unkonwn)
- 6 **Jason** - What is the total billable income for 2023?
 - Divide number by \$807,808. This gives collections rate for year so far.