

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