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Kendall Law

Quarterly Retreat Debrief

October 2, 2023

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Check-In

Check-In

Eileen

Personal

- Bought trip to Costa Rica (2024) + Africa (2025)!

Professional

- Have surpassed last years #'s
- Got new space!

Goals for the Day

- Get clear about profit margin
- Help Maria really understand Rocks

Maria

Personal

- Took a vacation!

Professional

- Firing/Off-boarding and onboarding
 - We're more compliant
 - We're more organized

Goals for the Day

- Leave confident with my rocks + how to to deconstruct + manage people on them

Quarter Review

Accomplishments, Lessons Learned, Realizations

Accomplishments

- Let two people go
- Replaced toxic employees w/ mellow employees
- 4 positions hired
 - Reception
 - UD Paralegals
 - Civil Paralegal
 - Contract Attorney
- Took over whole bottom floor
- Hired Tara

Realizations & Lessons Learned

- 1 bad apple spoils the bunch. You need to fire fast, + not make excuses
- It's the qualities of the individual, not the actual person to meet the needs for the position.
- I'm never going to lose money on a producer, so hire proactively.

Rocks Reconciliation

- 1 Conduct 4 inaugural audit systems (Maria) - Not Done
- 2 Clean up Lawmatics templates, reports, and referral sources (Maria) - Not Done
- 3 Create and Implement monthly "Did you know" series (Eileen) - Done
- 4 Conduct refresher training (Eileen) - Not Done

Goal Review + Goals

2023 VISION DECK

Kendall Law

[Law Firm Name]

2023 GOALS		Q1				Q2				Q3				Q4			
NAME	GOAL (\$ or #)	QUARTERLY ACTUAL (\$ or #)	Q1 ACTUALS BROKEN DOWN BY MONTH			QUARTERLY ACTUAL (\$ or #)	Q2 ACTUALS BROKEN DOWN BY MONTH			QUARTERLY ACTUAL (\$ or #)	Q3 ACTUALS BROKEN DOWN BY MONTH			QUARTERLY GOAL (\$ or #)	Q4 GOALS BROKEN DOWN BY MONTH		
			JANUARY	FEBRUARY	MARCH		APRIL	MAY	JUNE		JULY	AUGUST	SEPTEMBER		OCTOBER	NOVEMBER	DECEMBER
REVENUE	\$1,892,009	\$458,725	\$167,052	\$150,925	\$140,748	\$419,022	\$148,240	\$153,501	\$117,281	\$407,499	\$161,627	\$122,632	\$123,240	\$606,763	\$210,763	\$198,000	\$198,000
BY PRACTICE AREA		BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA Estimated				BY PRACTICE AREA			
Unlawful Detainer	\$1,243,169	\$310,917	\$113,782	\$103,300	\$93,835	\$227,138	\$84,085	\$79,493	\$63,560	\$248,351	\$103,864	\$78,117	\$66,370	\$456,763	\$160,763	\$148,000	\$148,000
Civil Disputes	\$434,126	\$115,456	\$40,261	\$42,432	\$32,773	\$122,601	\$44,462	\$46,800	\$31,339	\$106,069	\$35,113	\$28,386	\$42,570	\$90,000	\$30,000	\$30,000	\$30,000
Gravy	\$214,677	\$32,313	\$13,020	\$5,194	\$14,099	\$69,285	\$19,693	\$27,210	\$22,382	\$53,079	\$22,650	\$16,129	\$14,300	\$60,000	\$20,000	\$20,000	\$20,000
BY PRACTICE AREA		BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA			

NOTES																		
Recalculate pie-chart from June Debrief for January Retreat																		

Q4 GOALS

GOAL	GOAL NAME	GOAL (\$ or #)	Q4 GOALS BROKEN DOWN BY MONTH		
			OCT	NOV	DEC
	REVENUE	\$606,763	\$210,763	\$198,000	\$198,000

BY PRACTICE AREA

Unlawful Detainer	\$456,763	\$160,763	\$148,000	\$148,000
Civil Disputes	\$90,000	\$30,000	\$30,000	\$30,000
Gravy	\$60,000	\$20,000	\$20,000	\$20,000

GOAL

UD HOURS				
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BY PRACTICE AREA

UD Attorney Hours	600 Hours	200 Hours	200 Hours	200 Hours
UD Paralegal 1	525 hours	175 hours	175 hours	175 hours
UD Paralegal 2	525 hours	175 hours	175 hours	175 hours

Paralegals now need to be at 350 hours

GOAL

IMPORTANT REMINDERS

Eileen's plan for Lorena to hit 175 hours is 6 complaints and 3 default/writ packages per day
Attorney hours can be a combination of contract attorneys, Alice, and Eileen

Q4 ROCKS

1 IMPLEMENT LORENA’S WORK PLAN (EILEEN)

2 CREATE COMPREHENSIVE A ROLE RESPONSIBILITIES FOR CUSTOMER RELATIONS OFFICE ADMINISTRATION AND RELATED TO AIRTABLE (EILEEN)

3 COMPLETE AIRTABLE AUDIT (MARIA)

4 COMPLETE LAWMATICS NEW CLIENT INFO AUDIT (MARIA)

5 COMPLETE SMOKEBALL NEW FILE DATA AUDIT (MARIA)

STRATEGIES FOR WHEN OFF TRACK

INTERNALLY OFF TRACK	EXTERNALLY OFF TRACK

Rocks

Q4 Rocks

- 1 Implement Lorena's Work Plan (**Eileen**)
 - Calculate how she will hit hours
 - 6 complaints
 - 3 default/ Wit packages } Per day
 - Eileen communicate to Alice the above
 - Eileen communicate to Lorena the above
 - Lorena review hours daily
 - Communicate to Alice any barriers to achieving daily goals
 - Alice reviews weekly hours for discrepancies
 - Alice discuss discrepancies w/ Lorena
 - If barriers can't be remedied, go to Eileen
 - Alice + Eileen meet weekly to ensure plan being followed
- 2 Create comprehensive role responsibilities for customer relations and office administration, related to Airtable (**Eileen**)
- 3 Complete Airtable audit (**Maria**)
- 4 Complete Lawmatics new client info audit (**Maria**)
- 5 Complete Smokeball new file data audit (**Maria**)