

2023 VISION DECK

Q4 PLANNING RETREAT | 2023

Practice Area Breakdown

Kendall Law

[Law Firm Name]

2023 GOALS	
NAME	GOAL (\$ or #)
REVENUE	\$1,892,009
BY PRACTICE AREA	
Unlawful Detainer	\$1,243,169
Civil Disputes	\$434,126
Gravy	\$214,677

Q1			
QUARTERLY ACTUAL (\$ or #)	Q1 ACTUALS BROKEN DOWN BY MONTH		
	JANUARY	FEBRUARY	MARCH
\$458,725	\$167,052	\$150,925	\$140,748
BY PRACTICE AREA			
\$310,917	\$113,782	\$103,300	\$93,835
\$115,456	\$40,251	\$42,432	\$32,773
\$32,313	\$13,020	\$5,194	\$14,099

Q2			
QUARTERLY ACTUAL (\$ or #)	Q2 ACTUALS BROKEN DOWN BY MONTH		
	APRIL	MAY	JUNE
\$419,022	\$148,240	\$153,501	\$117,281
BY PRACTICE AREA			
\$227,138	\$84,085	\$79,493	\$63,560
\$122,601	\$44,462	\$46,800	\$31,339
\$69,285	\$19,693	\$27,210	\$22,382

Q3			
QUARTERLY ACTUAL (\$ or #)	Q3 ACTUALS BROKEN DOWN BY MONTH		
	JULY	AUGUST	SEPTEMBER
\$407,499	\$161,627	\$122,632	\$123,240
BY PRACTICE AREA			
\$248,351	\$103,864	\$78,117	\$66,370
\$106,069	\$35,113	\$28,386	\$42,570
\$53,079	\$22,650	\$16,129	\$14,300

Q4			
QUARTERLY GOAL (\$ or #)	Q4 GOALS BROKEN DOWN BY MONTH		
	OCTOBER	NOVEMBER	DECEMBER
\$606,763	\$210,763	\$198,000	\$198,000
BY PRACTICE AREA			
\$456,763	\$160,763	\$148,000	\$148,000
\$90,000	\$30,000	\$30,000	\$30,000
\$60,000	\$20,000	\$20,000	\$20,000
BY PRACTICE AREA			
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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				
	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