

Q4 2023 VISION DECK

Q4 PLANNING RETREAT | 2023

Practice Area Breakdown

Liberty Law Center

[Law Firm Name]

[illegible]

NOTES

Goal for Criminal Law average case revenue is \$4,500 by the end of 2023

Goal for DUI Cases average case revenue is \$6,000 by the end of 2023

Goal for Family Law average case revenue to \$10,000 by end of 2023, \$12,000+ end of Q2 2024

Septembers goals = September to date + monthly goal

2024 VISION DECK

Liberty Law Center

[Law Firm Name]

2024 GOALS		Q1				Q2				Q3				Q4			
NAME	GOAL (\$ or #)	QUARTERLY GOAL (\$ or #)	Q1 GOALS BROKEN DOWN BY MONTH			QUARTERLY GOAL (\$ or #)	Q2 GOALS BROKEN DOWN BY MONTH			QUARTERLY GOAL (\$ or #)	Q3 GOALS 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
FIRM REVENUE	\$3,239,250	\$565,875	\$190,125	\$192,750	\$183,000	\$748,125	\$231,375	\$241,500	\$275,250	\$892,500	\$298,875	\$296,250	\$297,375	\$1,032,750	\$315,375	\$345,000	\$372,375
BY PRACTICE AREA		BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA			
[DR] REVENUE	\$2,484,000	\$432,000	\$144,000	\$144,000	\$144,000	\$576,000	\$168,000	\$192,000	\$216,000	\$684,000	\$234,000	\$228,000	\$222,000	\$792,000	\$240,000	\$264,000	\$288,000
[CR] REVENUE	\$755,250	\$133,875	\$46,125	\$48,750	\$39,000	\$172,125	\$63,375	\$49,500	\$59,250	\$208,500	\$64,875	\$68,250	\$75,375	\$240,750	\$75,375	\$81,000	\$84,375
FIRM NEW CASE VALUES	\$3,492,000	\$594,000	\$198,000	\$198,000	\$198,000	\$922,500	\$307,500	\$307,500	\$307,500	\$918,000	\$306,000	\$306,000	\$306,000	\$1,206,000	\$402,000	\$402,000	\$402,000
BY PRACTICE AREA		BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA			
[DR] New Case Values	\$2,736,000	\$432,000	\$144,000	\$144,000	\$144,000	\$720,000	\$240,000	\$240,000	\$240,000	\$648,000	\$216,000	\$216,000	\$216,000	\$936,000	\$312,000	\$312,000	\$312,000
[CR] New Case Values	\$904,500	\$162,000	\$54,000	\$54,000	\$54,000	\$202,500	\$67,500	\$67,500	\$67,500	\$270,000	\$90,000	\$90,000	\$90,000	\$270,000	\$90,000	\$90,000	\$90,000
[DR] Cases Open	228	36	12	12	12	60	20	20	20	54	18	18	18	78	26	26	26
[CR] Cases Open	144	36	12	12	12	36	12	12	12	36	12	12	12	36	12	12	12

NOTES

New DR attorney: 8 cases a month for first 3 months (April -June)

Criminal Law average case revenue is \$4,500 for first 6 months, \$6,000 for next 6 months

Family Law average case revenue is \$12,000

Q4 GOALS

GOAL NAME	GOAL (\$ or #)	Q4 GOALS BROKEN DOWN BY MONTH		
		OCT	NOV	DEC
REVENUE	\$406,500	\$135,500	\$135,500	\$135,500

BY PRACTICE AREA

[DR] New Case Values	\$253,500	\$84,500	\$84,500	\$84,500
[DR] Cases Open	39	13	13	13
[CR] New Case Values	\$153,000	\$51,000	\$51,000	\$51,000
[CR] Cases Open	36	12	12	12

BY PRACTICE AREA

IMPORTANT REMINDERS

<ul style="list-style-type: none">Monthly Casual Check-ins (Drake w/ DR team)Daily HuddleIncentive<ul style="list-style-type: none">Could incentivize above \$72K/month new-case revenueCould incentivize support team on milestone revenue/ total revenue

Q4 ROCKS

- 1 Build + implement Lawmatics (Crista)
- 2 Implement uniform DR communication system (Drake)
- 3 Map out client journey for DR (Drake)
- 4 Improve attorney onboarding process (Bill)
 - Expectations w/ case management
- 5 Hire virtual DR Legal Assistant (Crista)
- 6 Deliver Team Rollout (Bill)
- 7 Refine intake process (Bill)

STRATEGIES FOR WHEN OFF TRACK

INTERNALLY OFF TRACK	EXTERNALLY OFF TRACK