

Lovins Trosclair

[Law Firm Name]

2023 GOALS		Q1				Q2				Q3				Q4			
NAME	JANUARY - AUGUST ACTUAL (\$ or #)	QUARTERLY ACTUAL (\$ or #)	Q1 ACTUALS BROKEN DOWN BY MONTH			QUARTERLY ACTUAL (\$ or #)	Q2 ACTUALS BROKEN DOWN BY MONTH			JULY - AUGUST 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	\$743,560	\$335,003	\$88,079	\$51,812	\$195,115	\$298,114	\$73,538	\$120,316	\$104,260	\$110,443	\$52,443	\$58,000	\$200,000	\$375,000	\$125,000	\$125,000	\$125,000
BY PRACTICE AREA		BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA		ESTIMATED		FORCASTED		BY PRACTICE AREA	
BL	\$100,971	\$61,353	\$4,150	\$0	\$57,203	\$39,618	\$10,703	\$16,595	\$12,320	Not enough Data	No Data	No Data	No Data	\$30,000	\$10,000	\$10,000	\$10,000
PI	\$532,205	\$273,711	\$83,947	\$51,812	\$137,952	\$258,494	\$62,834	\$103,720	\$91,940	Not enough Data	No Data	No Data	No Data	\$345,000	\$115,000	\$115,000	\$115,000
Google Reviews														10	3	3	4
PI Cases Closed	13	5	4	0	1	7	3	2	2	Not enough Data	No Data	No Data	No Data	24	8	8	8
BY PRACTICE AREA		BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA			

NOTES																		
Based on PI Average Case Fee \$16,000																		

SEPTEMBER - NOVEMBER

GOAL	GOAL NAME	GOAL (\$ or #)	Q4 GOALS BROKEN DOWN BY MONTH		
			SEPTEMBER	OCTOBER	NOVEMBER
	REVENUE	\$375,000	\$125,000	\$125,000	\$125,000

BY PRACTICE AREA

BL	\$30,000	\$10,000	\$10,000	\$10,000
PI	\$345,000	\$115,000	\$115,000	\$115,000
Google Reviews	10	3	3	4

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BY PRACTICE AREA

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Q4 ROCKS

1

Create a written process and Filevine implementation for every Pre-Lit bulleton Accountability Chart. (Michael)
-How does Pete know they’re being maintained?

2

Create written process + Filevine implementation for every Pre-trial bullet under lit on Accountability Chart. (Michael)
- How does Pete know they’re being maintained?

3

Map out 2024 marketing plan (Pete)

IMPORTANT REMINDERS

Go through docket - Which cases are ripe for settlement 2023? (Michael)
Revise intake for Michael (Michael)
Formalize and document intake process (Pete)

STRATEGIES FOR WHEN OFF TRACK

INTERNALLY OFF TRACK	EXTERNALLY OFF TRACK

2024
VISION DECK

LOVINS TROSCLAIR

[Law Firm Name]

2024 GOALS		Q1				Q2				Q3				Q4			
NAME	GOAL (\$ or #)	QUARTERLY GOALS (\$ or #)	Q1 GOALS BROKEN DOWN BY MONTH			QUARTERLY GOALS (\$ or #)	Q2 GOALS BROKEN DOWN BY MONTH			QUARTERLY GOALS (\$ or #)	Q3 GOALS 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	\$1,125,000	\$375,000	\$125,000	\$125,000	\$125,000	\$375,000	\$125,000	\$125,000	\$125,000	\$375,000	\$125,000	\$125,000	\$125,000				
BY PRACTICE AREA		BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA			
BL	\$225,000	\$75,000	\$25,000	\$25,000	\$25,000	\$75,000	\$25,000	\$25,000	\$25,000	\$75,000	\$25,000	\$25,000	\$25,000				
PI (Pre-lit)	\$600,000	\$200,000	\$66,666	\$66,666	\$66,666	\$200,000	\$66,666	\$66,666	\$66,666	\$200,000	\$66,666	\$66,666	\$66,666				
PI (Lit)	\$300,000	\$100,000	\$33,333	\$33,333	\$33,333	\$100,000	\$33,333	\$33,333	\$33,333	\$100,000	\$33,333	\$33,333	\$33,333				
PI (Pre-Lit) Cases Closed	48	16	6	6	6	16	6	6	6	16	6	6	6				
PI (Lit) Cases Closed	15	5	2	2	2	5	2	2	2	5	2	2	2				
BY PRACTICE AREA		BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA			

NOTES																		
Based on PI Average Case Fee \$16,000																		