

INDIANA ESTATE AND ELDER LAW

[Law Firm Name]

2024 GOALS	
NAME	GOAL (\$ or #)
REVENUE	\$2,250,000
BY PRACTICE AREA	
Estate Planning	\$1,386,900
Estate Trust Administration	\$393,300
Elder Law	\$289,800
Maintenance Program	N/A
AR	N/A
New Matters	595
BY PRACTICE AREA	
Estate Planning	478
Estate Trust Administration	73
Elder Law	44
Initial Contacts	988
Initial Meetings	676

JUNE - AUGUST				
QUARTERLY GOALS (\$ or #)	Q1 GOALS BROKEN DOWN BY MONTH			
	JUNE	JULY	AUGUST	
\$466,084	\$95,020	\$174,334	\$196,730	
BY PRACTICE AREA				
\$269,965	\$64,375	\$96,324	\$109,266	
\$38,102	\$6,000	\$6,952	\$25,150	
\$74,023	\$24,450	\$9,513	\$40,060	
\$78,179	\$195	\$59,460	\$18,524	
BY PRACTICE AREA				
104	30	30	44	
9	0	5	4	
16	1	7	8	
BY PRACTICE AREA				

SEPTEMBER - NOVEMBER				
QUARTERLY ACTUALS (\$ or #)	Q2 GOALS BROKEN DOWN BY MONTH			
	SEPTEMBER	OCTOBER	NOVEMBER	
\$419,913	\$179,503	\$131,310	\$109,100	
BY PRACTICE AREA				
\$226,228	\$142,068	\$84,160	LACK OF DATA	To date
\$45,050	\$13,000	\$32,050	LACK OF DATA	
\$26,180	\$15,155	\$11,025	LACK OF DATA	
\$13,355	\$9,280	\$4,075	LACK OF DATA	
Sep + Oct				
BY PRACTICE AREA				
82	36	46	LACK OF DATA	
5	1	4	LACK OF DATA	
17	11	6	LACK OF DATA	
217	100	89	28	
TO DATE				
149	70	56	23	
TO DATE				

DECEMBER - FEBRUARY				
QUARTERLY GOALS (\$ or #)	Q3 GOALS BROKEN DOWN BY MONTH			
	DECEMBER	JANUARY	FEBRUARY	
\$840,000	\$205,000	\$205,000	\$205,000	
BY PRACTICE AREA				
\$412,050	\$137,350	\$137,350	\$137,350	Practice Area + AR + Maintenance
\$116,850	\$38,950	\$38,950	\$38,950	Practice Areas Only
\$86,100	\$28,700	\$28,700	\$28,700	
\$175,000				
\$50,000				
BY PRACTICE AREA				
96	32	32	32	
15	5	5	5	
9	3	3	3	
324	108	108	108	
240	80	80	80	

MARCH - MAY				
QUARTERLY GOAL (\$ or #)	Q4 GOALS BROKEN DOWN BY MONTH			
	MARCH	APRIL	MAY	
\$524,000				
BY PRACTICE AREA				
BY PRACTICE AREA				
BY PRACTICE AREA				

NOTES

\$150,000 Goal for AR in Q4

DECEMBER - FEBRUARY GOALS

GOAL	GOAL NAME	GOAL (\$ or #)	Q3 GOALS BROKEN DOWN BY MONTH		
			DECEMBER	JANUARY	FEBRUARY
	REVENUE	\$840,000	\$205,000	\$205,000	\$205,000

BY PRACTICE AREA

ESTATE PLANNING	\$412,050	\$137,350	\$137,350	\$137,350
ESTATE TRUST ADMINISTRATION	\$116,850	\$38,950	\$38,950	\$38,950
ELDER LAW	\$86,100	\$28,700	\$28,700	\$28,700
MAINTENANCE PROGRAM	\$175,000			

GOAL	AR	\$50,000			
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GOAL	NEW MATTERS				
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BY PRACTICE AREA

ESTATE PLANNING	96	32	32	32
ESTATE TRUST ADMINISTRATION	15	5	5	5
ELDER LAW	9	3	3	3

GOAL	INITIAL CONTACTS	324	108	108	108
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GOAL	INITIAL MEETINGS	240	80	80	80
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IMPORTANT REMINDERS

ROCKS

1 Train attorney to replace Justin by February 2024 (Justin)

2 Implement hybrid schedule to maximize office space (Trisa)

3 Develop + implement the cancellation fee and consequences for late payments (Trisa)

4 Conduct an AR audit (Jenny)

5 Develop + implement process for ‘undecided tracking’ (Trisa)

6 Change corporate name with entire portfolio considered (Jenny)

STRATEGIES FOR WHEN OFF TRACK

INTERNALLY OFF TRACK	EXTERNALLY OFF TRACK