## **VISION DECK**

## Johnson & Alday

[Law Firm Name]

2024 GOALS		Q1				Q2				Q3				Q4			
NAME	GOAL (\$ or #)	QUARTERLY ACTUALS (\$ or #)	Q1 ACTUALS BROKEN DOWN BY MONTH			QUARTERLY GOALS	Q2 GOALS BROKEN DOWN BY MONTH			QUARTERLY GOALS (\$ or #)	Q3 GOALS BROKEN DOWN BY MONTH			QUARTERLY GOAL (\$ or #)	Q4 GOALS BROKEN DOWN BY MONTH		
	(\$ or #)	(\$ or #)	JANUARY	FEBRUARY	MARCH	(\$ or #)	APRIL	MAY	JUNE	(\$ or #)	JULY	AUGUST	SEPTEMBER	(\$ or #)	OCTOBER	NOVEMBER	DECEMBER
REVENUE	\$2.3M	\$666,830	\$215,592	\$92,267	\$358,971	\$485,345	\$102,735	\$191,305	\$191,305	\$573,915	\$191,305	\$191,305	\$191,305	\$573,915	\$191,305	\$191,305	\$191,305
BY PRACTICE AREA		BY PRACTICE AREA				BY PRACTICE AREA	^April Actuals			BY PRACTICE AREA				BY PRACTICE AREA			
PERSONAL INJURY	\$1,946,500	\$584,672	\$176,115	\$73,071	\$335,487	\$394,002	\$71,392	\$161,305	\$161,305	\$483,915	\$161,305	\$161,305	\$161,305	\$483,915	\$161,305	\$161,305	\$161,305
WORKERS COMP	\$353,500	\$82,158	\$39,478	\$19,196	\$23,484	\$91,343	\$31,343	\$30,000	\$30,000	\$90,000	\$30,000	\$30,000	\$30,000	\$90,000	\$30,000	\$30,000	\$30,000
CASES OPENED (PI)	161	26	8	6	12	45	15	15	15	45	15	15	15	45	15	15	15
CASES OPENED (WC)	103	18	6	7	5	31	13	9	9	27	9	9	9	27	9	9	9

## NOTES

- GOAL IS 20% INCREASE IN PI CASES OPENED FROM 2023
- 9 PER MONTH PER WC WAS DECIDED AS REASONABLE
- REVENUE TO DATE: \$769,565
- THEY THINK THEY CAN CONSERVATIVELY CLOSE 50 PI CASES THE REMAINDER OF THIS YEAR, WHICH PUTS THEM AT \$1.3M.
- THEN, IF THEY AVERAGE 25K A MONTH IN WC BETWEEN HERE AND THE END OF THE YEAR, THAT'S \$200K, WHICH MEANS THEY WILL EASILY HIT \$1.5M.
- THIS WAS HELPFUL FOR THEM TO SEE THAT IT IS POSSIBLE TO GET TO \$2.3 GOAL.

## **VISION DECK**

		Q2	GOALS			Q2 ROCKS					
Ì	GOAL GOAL Q2 GOALS BROKEN DOWN BY MO		BY MONTH								
Į	NAME	(\$ or #)	APRIL	MAY	JUNE						
GOAL	REVENUE	\$485,345	\$102,735	\$191,305	\$191,305	1 Hire Case Manager (John)					
	BY PRACTICE AREA		^April Actuals	5							
	PERSONAL INJURY	\$394,002	\$71,392	\$161,305	\$161,305	2 Hire for Ops (John)					
	WORKERS COMP	\$91,343	\$31,343	\$30,000	\$30,000						
GOAL	CASES OPENED (PI)	45	15	15	15	3 Implement Core Values w/ team (John)					
GOAL	CASES OPENED (WC)	31	13	9	9						
						Adjust compensation plan to invest in the business (John)					
		IMPORTA	NT REMIND	ERS							
						5 Create training modules for case flow (John)					
						OTHER IMPORTANT INITIATIVES					