

# 12 MONTH VISION DECK

## LOVINS LAW

[Law Firm Name]

12 MONTH GOALS		OCTOBER - DECEMBER				JANUARY - MARCH				APRIL - JUNE				JULY - SEPTEMBER			
NAME	GOAL (\$ or #)	QUARTERLY ACTUALS (\$ or #)	ACTUALS BROKEN DOWN BY MONTH			QUARTERLY ACTUALS (\$ or #)	ACTUALS BROKEN DOWN BY MONTH			QUARTERLY ACTUALS (\$ or #)	ACTUALS BROKEN DOWN BY MONTH			QUARTERLY GOALS (\$ or #)	GOALS BROKEN DOWN BY MONTH		
			OCTOBER	NOVEMBER	DECEMBER		JANUARY	FEBRUARY	MARCH		APRIL	MAY	JUNE		JULY	AUGUST	SEPTEMBER
<b>REVENUE</b>	<b>\$1,500,000</b>	<b>\$247,288</b>	\$18,097	\$104,728	\$124,463	<b>\$316,804</b>	\$49,352	\$214,375	\$50,900	<b>\$241,024</b>	\$97,936	\$89,980	\$53,108	<b>\$467,954</b>	\$155,984	\$155,984	\$155,984
BY PRACTICE AREA		BY PRACTICE AREA		BY PRACTICE AREA		BY PRACTICE AREA		BY PRACTICE AREA		BY PRACTICE AREA		BY PRACTICE AREA		BY PRACTICE AREA		BY PRACTICE AREA	
<b>BL</b>	<b>\$270,048</b>	<b>\$55,054</b>	\$6,275	\$40,874	\$7,905	<b>\$64,994</b>	\$14,668	\$35,223	\$15,103	<b>\$119,012</b>	\$58,410	\$12,961	\$47,641	<b>\$75,000</b>	\$25,000	\$25,000	\$25,000
<b>PI (Pre-lit)</b>	<b>\$551,455</b>	<b>\$51,854</b>	\$0	\$51,854	\$0	<b>\$185,238</b>	\$35,532	\$119,435	\$30,271	<b>\$6,254</b>	\$827	\$2,619	\$2,808	<b>\$157,182</b>	\$52,394	\$52,394	\$52,394
<b>PI (Lit)</b>	<b>\$736,644</b>	<b>\$138,128</b>	\$10,070	\$12,000	\$116,058	<b>\$126,971</b>	\$7,859	\$106,935	\$10,000	<b>\$103,987</b>	\$20,667	\$74,400	\$8,920	<b>\$235,772</b>	\$78,590	\$78,590	\$78,590
<b>PI (Pre-Lit) Cases Closed</b>	<b>47</b>	<b>2</b>	0	2	0	<b>11</b>	4	4	3	<b>3</b>	0	1	2	<b>17</b>	5	6	6
<b>PI (Lit) Cases Closed</b>	<b>40</b>	<b>6</b>	2	1	3	<b>11</b>	3	4	4	<b>10</b>	4	4	2	<b>12</b>	4	4	4

### NOTES

## JULY-SEPTEMBER GOALS

GOAL NAME	GOAL (\$ or #)	GOALS BROKEN DOWN BY MONTH		
		JULY	AUGUST	SEPTEMBER
<b>REVENUE</b>	<b>\$467,954</b>	\$155,984	\$155,984	\$155,984
BY PRACTICE AREA				
<b>BL</b>	<b>\$75,000</b>	\$25,000	\$25,000	\$25,000
<b>PI (Pre-lit)</b>	<b>\$157,182</b>	\$52,394	\$52,394	\$52,394
<b>PI (Lit)</b>	<b>\$235,772</b>	\$78,590	\$78,590	\$78,590
<b>GOAL PI (Pre-Lit) Cases Closed</b>	<b>7</b>	5	6	6
<b>GOAL PI (Lit) Cases Closed</b>	<b>12</b>	4	4	4

## OTHER IMPORTANT INITIATIVES

Implement monthly follow-up meeting with David + Brandon

Raise Drew's rate to \$350 and Curtis's rate to \$400

## NOTES


## ROCKS

- 1 Implement phone solution for zero missed calls (Pete)** Due end of August
- 2 Create + rollout job descriptions for every team member in the firm (Michael)** Due September 15th
- 3 Create, document + train on all bookkeeping processes (Pete)** Due August 6th
- 4 Create system for collecting Google reviews (Pete)** Due end of September
- 5 Train Rawan on Pre-Litigation system (up until negotiating demands) (Pete)** Due end of September
- 6 Train staff on Litigation systems (Michael)** Due August 2nd
- 7 Determine feasibility for AI to review medical records for Mass Tort marketing (Michael)** Due end of September
- 8 Create + implement a process to post weekly videos + emails (Michael)** Due end of August
- 9 Find 5 more events that we want to sponsor (Michael)** Due September 15th