

Indiana Estate & Elder Law

[Law Firm Name]

2024 GOALS		Q1				Q2				Q3				Q4			
NAME	GOAL (\$ or #)	QUARTERLY ACTUALS (\$ or #)	Q1 ACTUALS BROKEN DOWN BY MONTH			QUARTERLY ACTUALS (\$ or #)	Q2 ACTUALS BROKEN DOWN BY MONTH			QUARTERLY ACTUALS (\$ or #)	Q3 ACTUALS 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	\$2,312,889	\$750,330	\$325,282	\$242,959	\$182,089	\$455,119	\$154,650	\$166,417	\$134,052	\$590,500	\$201,766	\$246,123	\$142,611	\$511,000	\$171,500	\$171,500	\$171,500
BY PRACTICE AREA																	
Estate Planning	\$1,441,348	\$423,995	\$140,377	\$152,849	\$130,769	\$324,250	\$85,930	\$127,647	\$110,673	\$325,183	\$106,440	\$130,577	\$88,166	\$367,920	\$122,640	\$122,640	\$122,640
Estate Trust Administration	\$279,507	\$61,700	\$8,575	\$36,125	\$17,000	\$43,082	\$34,353	\$6,950	\$1,779	\$108,295	\$13,550	\$63,485	\$31,260	\$66,430			
Elder Law	\$260,830	\$64,325	\$9,800	\$31,075	\$23,450	\$79,150	\$26,425	\$31,125	\$21,600	\$50,925	\$27,475	\$11,475	\$11,975	\$66,430			
Maintenance Program		\$187,875	\$148,155	\$28,910	\$10,810	\$2,805	\$2,110	\$694		\$105,980	\$54,515	\$40,205	\$11,260				
														^To Date Numbers			
^Practice area goals will be short about \$10K of \$511K income because of a 2% income that does not come from practice areas or MT.																	
New Matters																	
BY PRACTICE AREA																	
Estate Planning		109	26	44	39	103	34	26	43	109	38	38	33	105	35	35	35
Estate Trust Administration		12	4	6	2	16	4	5	7	16	6	5	5	19			
Elder Law		19	6	11	2	18	7	4	7	16	4	6	6	19			
Initial Contacts		276	88	104	84	294	103	111	80	269	113	98	58	324	108	108	108
Initial Meetings		201	58	83	60	210	64	71	75	180	69	57	54	243	81	81	81
Conversion rate to 80%										AV. 82%	84%	81%	81%				

NOTES

- Goal - 27 Initial contacts per week. Calculating 12 weeks for Q4 (to account for a week of holidays)
- At December, because we will have closed date data, we will calculate sales projection and income

Q4 GOALS

GOAL NAME	GOAL (\$ or #)	GOALS BROKEN DOWN BY MONTH		
		OCTOBER	NOVEMBER	DECEMBER

<small>GOAL</small>	REVENUE	\$511,000	\$171,500	\$171,500	\$171,500
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BY PRACTICE AREA

ESTATE PLANNING	\$367,920	\$122,640	\$122,640	\$122,640
ESTATE TRUST ADMINISTRATION	\$66,430			
ELDER LAW	\$66,430			

GOAL NEW MATTERS

BY PRACTICE AREA

ESTATE PLANNING	105	35	35	35
ESTATE TRUST ADMINISTRATION	19			
ELDER LAW	19			

GOAL INITIAL CONTACTS

INITIAL CONTACTS	324	108	108	108
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GOAL INITIAL MEETINGS

INITIAL MEETINGS	243	81	81	81
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NOTES

- Goal - 27 Initial contacts per week. Calculating 12 weeks for Q4 (to account for a week of holidays)
- At December, because we will have closed date data, we will calculate sales projection and income

Q4 ROCKS

1 Review + implement changes to IM prep process - Trisa

2 Create marketing plan template tied to leading + lagging indicators - Anna

3 Determine lag time for revenue by practice area + matter type - Justin

4 Balance calendar with current team - Trisa

5 Document process for Maintenance Program - Rachael

6 Document process for HR - Justin

OTHER IMPORTANT INITIATIVES