

JEFF LEWIS LAW

[Law Firm Name]

*Monthly firm income is the previous month's production

		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 GOAL (\$ or #)	Q4 GOALS BROKEN DOWN BY MONTH		
			JANUARY	FEBRUARY	MARCH		APRIL	MAY	JUNE		JULY	AUGUST	SEPTEMBER		OCTOBER	NOVEMBER	DECEMBER
REVENUE	\$1,211,351	\$194,381	\$49,110	\$67,488	\$77,783	\$189,700	\$60,485	\$28,295	\$100,920	\$149,955	\$47,306	\$58,877	\$43,772	\$677,315	\$67,990	\$121,075	\$68,250
REVENUE BREAKDOWN		REVENUE BREAKDOWN		REVENUE BREAKDOWN		REVENUE BREAKDOWN		REVENUE BREAKDOWN		REVENUE BREAKDOWN		REVENUE BREAKDOWN		REVENUE BREAKDOWN		REVENUE BREAKDOWN	
Jeff Production	\$430,184	\$156,320	\$67,760	\$63,760	\$24,800	\$81,504	\$16,299	\$23,135	\$42,070	\$112,360	\$40,800	\$56,280	\$15,280	\$80,000	\$40,000	\$24,000	\$16,000
Kyla Production	\$458,420	\$137,680	\$47,880	\$42,560	\$47,240	\$109,360	\$31,230	\$41,026	\$37,104	\$93,780	\$31,540	\$33,660	\$28,580	\$117,600	\$55,200	\$24,000	\$38,400
Paralegal Production	\$258,158	\$52,005	\$21,690	\$14,295	\$16,020	\$49,553	\$17,385	\$16,823	\$15,345	\$92,475	\$23,970	\$44,375	\$24,130	\$64,125	\$25,875	\$20,250	\$18,000
HOURS BREAKDOWN		HOURS BREAKDOWN		HOURS BREAKDOWN		HOURS BREAKDOWN		HOURS BREAKDOWN		HOURS BREAKDOWN		HOURS BREAKDOWN		HOURS BREAKDOWN		HOURS BREAKDOWN	
Jeff Hours	656	218	89	89	41	125	25	32	67	213	54	114	20	100	60	30	20
Kyla Hours	1,172	348	120	106	122	281	80	105	96	249	81	95	72	294	138	60	60
Paralegal Hours	935.5	242	102	67	73	207	72	72	63	230	58	110	61	256.5	103.5	81	72

NOTES

- Kyla's expected to hit 1,290 hours in the year which accounts for 168 hours off a year, so her Q4 goal is 294
- Q4 Income (not production) from HH should be \$257,315
- \$677,315 Q4 income comes from the following:
 - \$250,000 (Ivan)(approx. \$200K attributed to Jeff)
 - \$90,000 (Dicorcia after \$10k paid to him)(approx. \$22k attributed to Kyla)
 - \$80,000 settlement for Shell
 - \$257,315 Q4 Income (not production) from HH

Q4 GOALS

GOAL NAME	GOAL (\$ or #)	Q3 GOALS BROKEN DOWN BY MONTH		
		OCTOBER	NOVEMBER	DECEMBER
Revenue	\$677,315	\$67,990	\$121,075	\$68,250

REVENUE BREAKDOWN

Jeff Production	\$80,000	\$40,000	\$24,000	\$16,000
Kyla Production	\$117,600	\$55,200	\$24,000	\$38,400
Paralegal Production	\$64,125	\$25,875	\$20,250	\$18,000

HOURS BREAKDOWN

Jeff Hours	100	60	30	20
Kyla Hours	294	138	60	60
Paralegal Hours	256.5	103.5	81	72

NOTES

- Kyla's expected to hit 1,290 hours in the year which accounts for 168 hours off a year, so her Q4 goal is 294
- Q4 Income (not production) from HH should be \$257,315
- \$677,315 Q4 income comes from the following:
 - \$250,000 (Ivan)(approx. \$200K attributed to Jeff)
 - \$90,000 (Dicorcia after \$10k paid to him)(approx. \$22k attributed to Kyla)
 - \$80,000 settlement for Shell
 - \$257,315 Q4 Income (not production) from HH

Q4 ROCKS

- 1 Fully train Nora to finalize a brief - Jason (Due November 8th)
- 2 Reintroduce monthly hours meetings with Tim, Kyla, Nora + cuddles with Jeff - Jason
- 3 Formally mentoring Tim on the three basics of litigation - Jeff
- 4 Make Tim an offer after bar results - Jeff

IMPORTANT REMINDERS