

Indiana Estate & Elder Law

[Law Firm Name]

2025 GOALS		Q1				Q2			Q3			Q4					
NAME	GOAL (\$ or #)	QUARTERLY GOALS (\$ or #)	Q1 GOALS BROKEN DOWN BY MONTH			QUARTERLY GOALS (\$ or #)	Q2 GOALS BROKEN DOWN BY MONTH			QUARTERLY GOALS (\$ or #)	Q3 GOALS 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	3M	\$882,000	\$294,000	\$294,000	\$294,000	\$667,500				\$783,000				\$667,500			
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	
Estate Planning	\$1,869,000	\$467,250	\$155,750	\$155,750	\$155,750	\$467,250				\$467,250				\$467,250			
Estate Trust Administration	\$373,800	\$93,450	\$31,150	\$31,150	\$31,150	\$93,450				\$93,450				\$93,450			
Elder Law	\$427,200	\$106,800	\$35,600	\$35,600	\$35,600	\$106,800				\$106,800				\$106,800			
Maintenance Program	\$330,000	\$214,500	\$71,500	\$71,500	\$71,500					\$115,500							
Initial Contacts	1,404	351				351				351				351			
Initial Meetings Scheduled	1,056	264				264				264				264			
Initial Meetings Showed	876	219				219				219				219			
Hired	704	176				176				176				176			

NOTES

- If they hit 2.4 M for 2024, that's a 25% growth increase over 2023.
- MT: 11% of revenue goal and 9% increase from year MT.

To hit 3M:

1. Hit the same #'s with the same ave value (\$3,500). Numbers would need to be hit 90% of the time.
2. Hit the same #'s with the increased ave value (\$4,000). Numbers would need to be hit 80% of the time.

- For 2025 projections, we are going to use scenario 2.

Q1 GOALS

GOAL NAME	GOAL (\$ or #)	GOALS BROKEN DOWN BY MONTH		
		JANUARY	FEBRUARY	MARCH

GOAL	REVENUE	\$882,000	\$294,000	\$294,000	\$294,000
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BY PRACTICE AREA

ESTATE PLANNING	\$467,250	\$155,750	\$155,750	\$155,750
ESTATE TRUST ADMINISTRATION	\$93,450	\$31,150	\$31,150	\$31,150
ELDER LAW	\$106,800	\$35,600	\$35,600	\$35,600
MAINTENANCE PROGRAM	\$214,500	\$71,500	\$71,500	\$71,500

GOAL	INITIAL CONTACTS	351	-	-	-
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GOAL	INITIAL MEETINGS SCHEDULED	264	-	-	-
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GOAL	INITIAL MEETINGS SHOWED	219	-	-	-
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GOAL	HIRED	176	-	-	-
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- For 2025 projections, we are going to use scenario 2.

Q1 ROCKS

- 1 Update incentive program - Justin
- 2 Hire Marketing - Trisa
- 3 Develop future associate track - Rachael
- 4 Determine lag time for revenue by practice area + matter type - Justin
- 5 Balance calendar with current team - Trisa
- 6 Document process for HR - Justin
- 7 Create post satellite office wrap-up process - Trisa
- 8 Takeover accounting to write process - Justin

OTHER IMPORTANT INITIATIVES