# **VISION DECK**

	0041	004	Q1 GOALS E					
	GOAL NAME	GOAL (\$ or #)	JANUARY	FEBRUARY	MARCH	İ	1	Imp buc
GOAL	REVENUE	\$800,000	\$266,667	\$266,667	\$266,667			
	BY PRACTICE AREA							
	Unlawful Detainer	\$620,850	\$206,950	\$206,950	\$206,950		2	Clea + Sr
	Civil Disputes	\$150,000	\$50,000	\$50,000	\$50,000			+ JI
	Gravy	\$29,150	\$9,717	\$9,717	\$9,717			Refi
							3	be a
GOAL	UD HOURS							are
	BY PRACTICE AREA							
	Attorney Hours	816	272	272	272			
	Paralegal Hours	1,089	363	363	363			
								By t
GOAL	CD HOURS						1	hit v
	BY PRACTICE AREA							
	Attorney Hours	180	60	60	60		•	
	Paralegal Hours	240	80	80	80		2	Age

#### Q1 ROCKS

- 1 Implementation of re-engagement campaigns for 3 buckets (Lauren)
- 2 Clean + update existing templates in Lawmatics + Smokeball (Eileen)
- Refine weekly intake meetings to provide reports and be able to talk intelligently about why the numbers are the way they are. (Gherabel)

### OTHER IMPORTANT INITIATIVES

1By the end of the quarter, hours are still being<br/>hit without Maria babysitting (Maria)

2 Agenda for producer meetings (Eileen)

3 Train Tom and Johnny on case management (Eileen)

4 Provide Eileen with audit data at weekly meetings (if there was an audit) (Lauren)

velocity work.

## **VISION DECK**

### Kendall Law

[Law Firm Name]

2025 GOALS		Q1			Q2			Q3				Q4					
NAME	GOAL (\$ or #)	QUARTERLY	Q1 GOALS BROKEN DOWN BY MONTH		QUARTERLY	Q2 GOALS BROKEN DOWN BY MONTH		QUARTERLY GOALS	Q3 GOALS BROKEN DOWN BY MONTH		QUARTERLY	Q4 GOALS BROKEN DOWN BY MONTH					
NAME	(\$ or #)	GOALS (\$ or #)		FEBRUARY	MARCH	GOALS (\$ or #)	APRIL	МАҮ	JUNE	GOALS (\$ or #)	JULY	AUGUST	SEPTEMBER	GOALS (\$ or #)	OCTOBER	NÖVEMBER	DECEMBER
	\$3,200,000	\$800,000	\$266,667	\$266,667	\$266,667	\$800,000	\$266,667	\$266,667	\$266,667	\$800,000	\$266,667	\$266,667	\$266,667	\$800,000	\$266,667	\$266,667	\$266,667
BY PRACTICE AREA		BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA			
Unlawful Detainer	\$2,483,400	\$620,850	\$206,950	\$206,950	\$206,950	\$620,850	\$206,950	\$206,950	\$206,950	\$620,850	\$206,950	\$206,950	\$206,950	\$620,850	\$206,950	\$206,950	\$206,950
Civil Disputes	\$600,000	\$150,000	\$50,000	\$50,000	\$50,000	\$150,000	\$50,000	\$50,000	\$50,000	\$150,000	\$50 <i>,</i> 000	\$50,000	\$50,000	\$150,000	\$50,000	\$50,000	\$50,000
Gravy	\$116,600	\$29,150	\$9,717	\$9,717	\$9,717	\$29,150	\$9,717	\$9,717	\$9,717	\$29,150	\$9,717	\$9,717	\$9,717	\$29,150	\$9,717	\$9,717	\$9,717
			_			_		_	_	_							
UD HOURS																	
BY PRACTICE AREA		BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA				BY PRACTICE AREA			
Attorney Hours	3,264	816	272	272	272	816	272	272	272	816	272	272	272	816	272	272	272
Paralegal Hours	4,356	1,089	363	363	363	1,089	363	363	363	1,089	363	363	363	1,089	363	363	363
DD HOURS																	
		100	10	( )						100	( )	10	10			( )	<i>(</i> <b>)</b>
Attorney Hours	720	180	60	60	60	180	60	60	60	180	60	60	60	180	60	60	60
Paralegal Hours	960	240	80	80	80	240	80	80	80	240	80	80	80	240	80	80	80

NOTES

### SAILING TO SUCCESS Q1 PLANNING RETREAT | 2025