

JEFF LEWIS LAW

[Law Firm Name]

2025 GOALS		Q1				Q2				Q3				Q4			
NAME	GOAL (\$ or #)	QUARTERLY ACTUALS (\$ or #)	Q1 ACTUALS BROKEN DOWN BY MONTH			QUARTERLY GOALS (\$ or #)	Q2 GOALS BROKEN DOWN BY MONTH			QUARTERLY GOALS (\$ or #)	Q3 GOALS 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	\$1,662,876	\$354,581	\$91,294	\$70,565	\$192,722	\$448,925	\$152,200	\$149,725	\$147,000	\$464,925	\$160,450	\$154,975	\$149,500	\$437,550	\$165,925	\$133,075	\$138,550
REVENUE BREAKDOWN		REVENUE BREAKDOWN				REVENUE BREAKDOWN				REVENUE BREAKDOWN				REVENUE BREAKDOWN			
Jammie Production	\$205,763	\$14,763	\$3,750	\$6,638	\$4,375	\$54,875	\$16,500	\$18,375	\$20,000	\$70,875	\$24,750	\$23,625	\$22,500	\$65,250	\$25,875	\$19,125	\$20,250
Jeff Production	\$537,942	\$177,942	\$50,022	\$89,840	\$38,080	\$120,000	\$40,000	\$40,000	\$40,000	\$120,000	\$40,000	\$40,000	\$40,000	\$120,000	\$40,000	\$40,000	\$40,000
Kyla Production	\$548,240	\$114,336	\$39,245	\$47,531	\$27,560	\$160,650	\$56,100	\$53,550	\$51,000	\$160,650	\$56,100	\$53,550	\$51,000	\$147,900	\$58,650	\$43,350	\$45,900
Tim Production	\$370,931	\$39,731	\$14,633	\$12,468	\$12,630	\$113,400	\$39,600	\$37,800	\$36,000	\$113,400	\$39,600	\$37,800	\$36,000	\$104,400	\$41,400	\$30,600	\$32,400
HOURS BREAKDOWN		HOURS BREAKDOWN				HOURS BREAKDOWN				HOURS BREAKDOWN				HOURS BREAKDOWN			
Jammie Hours	824	60	15	27	18	219.5	66	73.5	80	283.5	99	94.5	90	261	103.5	76.5	81
Jason Hours	440	183	47	100	36	88	31	29	28	88	31	29	28	81	32	24	25
Jeff Hours	677	227	67	112	48	150	50	50	50	150	50	50	50	150	50	50	50
Kyla Hours	1,290	287	99	119	69	378	132	126	120	378	132	126	120	348	138	102	108
Tim Hours	1,278	174	73	59	42	378	132	126	120	378	132	126	120	348	138	102	108

NOTES

- Jammie’s hours goal: 3 hours for April, 3.5 hours for May, 4 hours for June. July - December hours goal will be 4.5.
- The annual goals outlined to the left are what the totals will be after each person takes their allotted time off. We cannot know when that is going to occur during the year, so the breakdown of the annual goals (Q1-Q4) are showing the breakdown if they took no time off. We will adjust as we go through the year, but the goals to the left should be able to be hit because time off is accounted for.
- Using \$425 for Kyla’s rate because she was bumped to \$450 in March.

Q2 GOALS

GOAL NAME	GOAL (\$ or #)	Q2 GOALS BROKEN DOWN BY MONTH		
		APRIL	MAY	JUNE
Revenue	\$448,925	\$152,200	\$149,725	\$147,000

REVENUE BREAKDOWN

Jammie Production	\$54,875	\$16,500	\$18,375	\$20,000
Jeff Production	\$120,000	\$40,000	\$40,000	\$40,000
Kyla Production	\$160,650	\$56,100	\$53,550	\$51,000
Tim Production	\$113,400	\$39,600	\$37,800	\$36,000

HOURS BREAKDOWN

Jammie Hours	219.5	66	73.5	80
Jason Hours	88	31	29	28
Jeff Hours	150	50	50	50
Kyla Hours	378	132	126	120
Tim Hours	378	132	126	120

NOTES

- 98.7% is their collections rate for 31 - 60 days.
- Jammie’s hours goal: 3 hours for April, 3.5 hours for May, 4 hours for June. July - December hours goal will be 4.5.
- Using \$425 for Kyla’s rate because she was bumped to \$450 in March.

Q2 ROCKS

- Attend one Affinity meeting a month - Jeff
- Touch one person from existing referral list per week - Jeff
- Implement AR forms + triggers - Jason
- Improve calendar planning accuracy - Jeff
- Create admin onboarding procedure - Jason
- Fully onboard admin - Jason
- Take monthly check-in walk - Jeff
- Eliminate calendar issues - Jason

OTHER IMPORTANT INITIATIVES

- Have a reset conversation with Tim about hours + logging hours in a timely fashion (Jason)
- Reset expectations with entire team about goals + poll for team celebration ideas (Jason)
- Review Accountability Chart with Jammie and Cassidy (Jason)