

**Q3 Strategy Suggestions Based on 1st Quarter Progress**

**Annual Goal: \$600,000 Revenue (2025) 5-Year Dream Goal: \$5 Million**

---

**MARKETING**

**Objective:** Expand reach, deepen referral relationships, and increase brand visibility

WHAT	WHO	WHEN	NOTES/Resources
<b>Expand Referral Network:</b> <ul style="list-style-type: none"><li>Schedule in-person visits with 5 new local providers (female-owned clinics, chiropractors, etc.)</li></ul>	<b>Rachel</b>		
<b>Expand Referral Network:</b> <ul style="list-style-type: none"><li>Continue monthly coffee meetups with existing referral partners – assign action items post-meeting</li></ul>	<b>Rachel</b>		

<b>Expand Lead Network:</b> <ul style="list-style-type: none"> <li>Develop a monthly newsletter with updates, tips, and success stories</li> </ul>			
<b>Expand Lead Network:</b> <ul style="list-style-type: none"> <li>Daily Opens - You and the team</li> <li>5 daily opens for Rachel</li> <li>Team Daily: Social Media: Thanks for the follow! I love to connect - are you here for the content or do you need help with a legal matter?</li> <li>Create the follow up script</li> </ul>	<b>Rachel and then Exec Asst.</b>		<a href="#">Social Media SOP.docx</a>
<b>Expand Lead Network:</b>	<b>Rachel</b>		

Reach out to women spaces and therapist and provide information			
<b>GAS Calls - by virtual assistant</b> <ul style="list-style-type: none"> <li>• Create the script - and purpose of call</li> <li>• Create a prior client list with a brief summary of how you help them.</li> <li>• Create a training - part of onboarding</li> </ul>	<b>Exec Asst.</b>	<b>October</b>	<a href="#"><u>GAS call SOP 2025.docx</u></a>
<b>Teen Driver Outreach:</b> <ul style="list-style-type: none"> <li>• Follow up with at least 1 driver-ed schools per month</li> <li>• Host one educational webinar or in-person safety event targeting teen</li> </ul>			

<p>drivers and parents</p> <ul style="list-style-type: none"> <li>• See if can post webinar recordings in facebook groups for parents etc AND website</li> <li>• Develop the drip campaign which will become an automation for the next webinar for the most recent participants</li> </ul>			
<p><b>Women Entrepreneur Events:</b></p> <ul style="list-style-type: none"> <li>• Continue Scheduling the next event and begin promotion 4 weeks</li> <li>• Post-event: Send recap email with photos, thanks, and next invite link</li> </ul>	<p><b>Rachel</b></p>		

<b>Social Media:</b> <ul style="list-style-type: none"> <li>Instagram and Facebook- three reels a week and one wall post</li> </ul>	<b>Rachel/ Social Media Manager</b>		
<b>Marketing Rhythm:</b> <ul style="list-style-type: none"> <li>Time-block 30–60 mins/day for marketing tasks (calls, emails, outreach)</li> <li>Continue to Track weekly marketing actions in a shared dashboard (referral contacts, outreach, follow-ups)</li> </ul>			

## SALES

**Objective:** Streamline intake and improve lead-to-client conversion

WHAT	WHO	WHEN	NOTES/Resources
Intake Process:	Rachel		

<ul style="list-style-type: none"> <li>Finalize written intake SOP</li> </ul>			
<b>Intake Process:</b> <ul style="list-style-type: none"> <li>Create automation in Filevine (intake forms, task triggers, notifications)</li> </ul>	Rachel		
<b>Intake Process:</b> <ul style="list-style-type: none"> <li>Track and review conversion rates monthly (inquiries to signed cases)</li> </ul>	Rachel		
<b>CRM/Referral Tracking:</b> <ul style="list-style-type: none"> <li>Create and maintain a referral source database--be sure putting in notes and setting up system for follow ups</li> <li>Set follow-up reminders for each new potential referral source</li> </ul>	Rachel		

---

## OPERATIONS

**Objective:** Build internal systems for scalability, organization, and team efficiency

WHAT	WHO	WHEN	NOTES/Resources
<b>Filevine Mastery:</b> <ul style="list-style-type: none"><li>• Continue to Create template library (demands, new client intake, follow-ups)</li><li>• Weekly mini-trainings for staff to upskill on Filevine feature</li></ul>	Rachel		
<b>Pipeline Development:</b> <ul style="list-style-type: none"><li>• Build out arbitration and litigation case phases for Q3</li><li>• Maintain weekly pipeline report</li></ul>	Rachel		

with settlement opportunities and projections			
<b>Hiring:</b> <ul style="list-style-type: none"> <li>Finalize paralegal job description and begin interview process</li> </ul>			
<b>Hiring:</b> <ul style="list-style-type: none"> <li>Create onboarding training</li> </ul>			
<b>Hiring:</b> Hire and onborad part-time or contract admin assistant to support daily tasks	Rachel		
<b>Hiring:</b> Finalize training for virtual assistant and determine start date <ul style="list-style-type: none"> <li>Set up ability to call</li> <li>Have her take intake info from filevine and update lead tracker weekly</li> </ul>			



<ul style="list-style-type: none"> <li>Standard templates for letters etc that want her to send</li> </ul>			
<b>Workflow Efficiency:</b> <ul style="list-style-type: none"> <li>Create workflows in Filevine</li> </ul>	Rachel		
<b>Do the 30 day review for Linda and think about the most critical processes that want to be sure trained - Calendaring, Deadlines, Trust Account</b>			

## FINANCE & ADMIN

**Objective:** Strengthen financial foundation, manage debt, and increase profitability

WHAT	WHO	WHEN	NOTES/Resources
<b>Financial Review:</b> <ul style="list-style-type: none"> <li>Monthly review of Profit &amp; Loss statements with bookkeeper</li> </ul>	Rachel		
<b>Financial Review:</b>	Rachel		

<ul style="list-style-type: none"> <li>Identify highest income-generating case types and focus marketing efforts accordingly</li> </ul>			
<b>Debt Reduction:</b> <ul style="list-style-type: none"> <li>Implement automated debt payments based on fixed budget</li> </ul>	Rachel		
<b>Debt Reduction:</b> <ul style="list-style-type: none"> <li>Monitor and adjust personal and business budgets monthly</li> </ul>			
<b>Profit First Implementation:</b> <ul style="list-style-type: none"> <li>DONE Re-read book and apply action items (weekly check-ins on allocations)</li> </ul>	Rachel		

<p><b>Profit First Implementation:</b></p> <ul style="list-style-type: none"><li>• Track income vs. owner's pay, taxes, in shared dashboard</li></ul>	<p><b>Rachel</b></p>		
---	----------------------	--	--