

Core Focus

Helping people with loss and protecting legacies for generations to come

Niche - Compassionate probate and estate planning legal representation

10 Year Goal

The #1 Probate Law Firm in Michigan

- Judges know us and respect us
- Referrals from all over the state
- We are selective about our clients
- Known as a great place to work - our team is loyal and long-term
- Community outreach with the impact of making the world a better place

3 Year

12.31.2026 Revenue - 2 mil

2025

Revenue: 1.6

Operations Objectives

Increased productivity and efficiency through routine trainings

Solid processes with minimum errors - simplified and everyone follows

5 attorneys in production + Supervising attorney

7 paralegals

Supervising attorney less production

Right people in the right seats

System in place that very prepared for hearings/trial

Finance Administration

Expanding benefits to attract talent

Marketing

Billboard

Sales

PNC monthly calls

of viable leads

monthly appointments

Conversion rate

of cases open monthly/yearly

Average case value (by case type and how many of each to equal 2 mill)

1 Year

12/31/2024 REVENUE 1.1

91,600 per month to cover the overhead of \$85,000 plus bonuses

\$1.1M = 256 cases

FF 59% = 151 cases

Hourly 41%=105 cases

22 cases/month

FF = 13 cases

Hourly = 9

Need 856 leads in 2024

Need 800 consults in 2024

Operations Objectives:

Low team turnover

Right people in right seats

Core processes - documented, simplified and followed

*Error-free filing

- Examine why things are getting returned
- *Create checklists/process to correct the errors
- Train the team
- Training on the team on full use of workflows - including checklists

Client Education on the whole system

Improving Case Flow

Inclusivity of remote and hybrid workers

Team building and bonding programs

Growth development questions

*One Attorney Hire replace Dayna

If we are on track for exceeding 260 cases - hiring another attorney

Replacing Jordan - end of summer - hire by June 1st

- Nicole get end date for Jordan

Sales Objectives

2023: 219 opened

2024

Breakdown by case type and number

ACV = \$4,300.34

FF ACV = \$3,273.59

Hourly ACV = \$5,669.33

\$1.1M = 256 cases

FF 59% = 151 cases

Hourly 41%=105 cases

22 cases/month
FF = 13 cases
Hourly = 9

Jan 2024
FF=8 (down 5)
Hourly=1 (down 8)
Total=9 (down 13)

Feb 2024
FF=5
Hourly=5
Total=11

256 cases = 85 cases per lawyer

*Map of the state to track our referrals

*Hire and onboard Sales/client engagement

Marketing Objectives

of PNC Calls Needed Monthly
of Viable Leads needed Monthly

2023 # of Leads = 732
2023 # of Cases = 219
2023 Conversion = 29.9%

Jan 2024 Leads = 66
Jan 2024 Cases = 9
Jan 2024 Conversion = 16.6%
Jan 2024 - 37 appointments
Jan 2024 - appt to case conversion = 25%

2024 YTD Leads = 99
2024 YTD Cases = 20
2024 YTD Conversion = 20.2%
2024 YTD Appointments = 62
2024 YTD appointments to cases conversion = 32%

Need 856 leads in 2024
Need 800 consults in 2024

*Increase Conversion Rate

*Fine-tune tracking of intake - "unresponsive"

Unresponsive - could not schedule appt

Unresponsive - after appointment

Conflict

Duplicate lead

Fees too high

Handling on their own

No viable case

No longer needed/interested

No Show

Refer Out

Hired another lawyer

-what is the follow-up - when and how- 3 follow-ups - (no response move to newsletter)

*Create a form for Lena/team member to track if we receive call for something we do not handle

-criminal, bankruptcy

Name, email address, mailing address

Podcast - 3rd quarter Live

Guests

Topics

Intro

Video/Audio

Landing page for the podcast

*Conversations Digital - giving the outline - 1st quarter

*Outsource editing and publication -1st quarter

Expand other social media platforms

Instagram

*Themes for Months for Marketing

FINANCE/ADMIN

-Research benefits

- Evaluate finance reporting and review
- Create cash flow forecasting and budget
- *-CFO fractional
 - Intro by email
- *Need overhaul of computer system
 - Quotes review