

Tab 1

Revenue 2022 1.2

Revenue 2023 1.4

2026 Revenue Goal: 1,500,000

Monthly \$125,000

Revenue by Attorney:

2024 Revenue: 1,342,517.59 (collected) Billed 1,440,670.50

2025 Revenue: \$974,949.96 (collected) Billed \$1,071,815

April 2026

Rob's Caseload: 59

Savannah's Caseload: 65

Shyanne's Caseload: 18

Case Type	2024 Revenue	2025 Revenue	Difference
Assault	\$279,813	\$51,988	\$227,825
Child Abuse	\$20,000	0.00	
Domestic Violence	\$90,500	\$48,932	\$41,068
Drug Offense	\$77,412	\$127,848	
DUI	\$438,480	\$298,068	\$140,412
Expungement	\$12,500	\$12,400	
Felony Offense -Other	\$33,000	\$34,766	

Homicide	\$105,870.50	\$118,500	
Misdemeanor Offense - other	\$33,000	\$106,441	
Order of Protection	\$1,000	\$12,500	
Probation Violation	\$750.00	0.00	750.00
Sexual Exploitation of a Minor	\$82,354	\$5,000	\$77,354
Sexual Offense	\$140,725	\$72,937	\$67,788
Theft	\$28,810	\$75,000	
Traffic Violation	\$12,500	0.00	
Victim Rep	\$5,000	\$7,565	

MARKETING

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Action	Who	When	Notes/Resources
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Reaching out to referrals			
Increase Davidson, Williamson, Wilson, and Sumner counties DUI Advertise with BAR Community Events? Other marketing outside of digital?			
Discuss with Fuel • Focus on increasing DUI cases (\$600 to 750,000) • Focus on increasing domestic assaults (450,000 to 500)			
Increase Google Reviews - implement system for obtaining Currently • Alternative ways of giving reviews • Review Clio Automated Review asks	Lexlee (training Nicole/new team member)	June	Template for emails/sign/text

SALES/INTAKE

Action	Who	When	Notes/Resources
Review the intake process and how can be streamlined	Casey (Lexlee's help)	Ongoing	
Review how to track all calls and conversions, and follow up with clients who do not hire	Casey (Lexlee)	Ongoing	
Review the onboarding process for clients	Casey + Lexlee	Ongoing	
Consults on friday			
Listen to calls and do some training, Nicole Thomas and Sydney	Lexlee	Done	
Increase conversion rate	Lexee	Ongoing	
Create follow up system for pnc	Lexlee	Ongoing	
Examine sales training for Savannah	Lexlee		
Examine DUI conversions	Lexlee		
Review how the consults are being divided between attorneys	Shyanne		

Clear tracking of case types when files are opened	Chandler		
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OPERATIONS

ACTION	WHO	When	Notes/Resources
Edit accountability chart	Lexlee		New chart
Savannah coaching	Lexlee		
Create growth path and job descriptions and KPIs	Lexlee/Shyanne	3rd qtr	
Quarterly Reviews	Lexlee/Shyanne		
Hire another associate senior?		2nd or 3rd qtr revisit	
Improve culture and team building	Lexlee	ongoing	
Improve processes for pipeline - DUI/General Sessions? Improve client communication steps between court dates	Shyanne	Schedule session with shyanne	
Savannah assume DUI matters and general sessions matters (DUI, theft, domestic violence, assault, drugs)	Shyanne		

Coaching on boundaries and how to get out of kidnapped conversations			
Fun Committee and rewards	Lexlee		
Evaluate the pilot program - casey send notes kimberly@mindoverlaw.... schedule session with Casey Also look at reporting Basic tracking sheet	Lexlee		
Rework the weekly case meetings	Shyanne + Lexlee	DONE	
Improve Communications with Clients + improve client experience • Acknowledgement of contact within 48 hours • Communicating with clients - and setting precedent of expectations. If you don't hear from me, no news is good news • Once a month, contact with the client - create a system - create a different	Shyanne		

system based on whether in general session or circuit court (in general session, if touching a lot, we need a system to let to know) ● Improve client communication - phone calls for certain steps ● Be curious about clients that difficult to get in touch with - how would you like to update you? How would you like for us to get info from you. If really need to get in touch with you, how should we do that? ● Everyone updating Clio on the dashboard - next to the numbers - how best to get in touch with them. ● Who should we contact if an emergency and we can't reach you? That have permission to speak			
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• Call week before to give court date AND add to note in Clio Manage •			
Improve organization of case management: • Call the week before to give the court date AND add to the note in Clio Manage • Update the Case notes with every contact - even if just date of email and date of call • Print all case notes and have file ready before going to court and place in files • Improve how and who is responsible for getting the file ready for court			
Improve Trial Prep: • When prepping for file - and preparing for trial, at least 4 weeks prior, and set appointment with the			

client to review paperwork, file, etc • Set an appointment with the client to review with the attorney to go over the trial. Review goals and our case and the state's case.			
Improve the Process for prepping of clients in jail			
Evaluate the counties we want attorneys to own and divide caseload	Shyanne Need to give in writing to chandler and have implement		
Improve General Session communication			
Improve Circuit court communication before trial			
Updating case matters to reflect the actual case type in Clio	Casey	Done	
Focus on Savannah being DUI lawyer • 11 cases per month -what would we need to improve • What is Savannah's current caseload by			

case type (61 cases -			
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Finance

Determine overhead per month/year (100,000 minimum expenses) Increase profit margin	Casey	