Quick recap

The meeting focused on reviewing the law firm's performance metrics and addressing operational challenges. Julie reported that the firm crossed $1 million in revenue in 2025, reaching the milestone on October 23rd, with current projections showing they will hit it in August. The team discussed concerns about declining leads and billable hours, with leads dropping from 22 to 9 in recent weeks and conversion rates at 50% for May. They reviewed staffing updates, including three new hires (two paralegals and one receptionist) and Hara's departure, who resigned after receiving a Performance Improvement Plan. The discussion covered various operational issues, including SKU compliance problems, error tracking in documents, and the need for better training and onboarding processes. Lexlee proposed implementing weekly onboarding questions and formal 30-60-90 day reviews for new employees to improve retention. The team also discussed creating welcome calls and strategy meetings for hourly clients, updating templates, and improving marketing efforts through webinars and seminars.

Next steps

- DONE: Provide Hara's personal email to Lexlee for exit interview purposes.
- STACY -Separate caseload/SKU report data for dormant accounts and estate plans to enable clearer compliance analysis by case type.
- JULIE Sit down with attorneys to clarify needs for the strategy call script, develop the script, and conduct role-playing/training with them.
- JULIE: Create a video for children involved in estate plans (after receiving the outline of points from Nicole).
- STACY: Add to the workflow the process for checking client balance levels and preferences regarding future costs.
- LEXLEE Make a list of templates/forms that are unclear or could be improved for Nicole, especially those confusing in probate/estate cases.
- NICOLE: Get feedback from the accounting firm test to Nicole for review and comparison.
- STACY: Meet with Above the Bar on Friday to discuss the decline in leads and potential marketing strategies.
- STACY: Add a question to the intake process (welcome call or form) for emergency contact in case the client is unreachable.
- STACY: Update the workflow with the new script/checklist for strategy calls once developed.
- NICOLE Update or create a template for the "funding instructions" document as discussed with Nicole.

Lexlee

- Send a written exit interview to Hara via her personal email (to be provided by Julie); follow up quickly, as Hara's last day is today. ALSO SEND TO HANNAH AT PERSONAL EMAIL

- Implement weekly onboarding questions for new hires (Cheyenne, Brianna, Giselle) and send them independently; review responses with management.
- Set up and conduct formal 30, 60, and 90-day reviews for new hires, including self-reviews and management meetings.
- Review Nicole's error tracking report and, if needed, coordinate with the team to sort/analyze error types and percentages.
- Send original leadership questions to leadership and schedule the first leadership training (including feedback training for lawyers).
- DONE Schedule a meeting with Julie and Bruce to discuss offloading tasks from Julie's plate to allow focus on key initiatives.
- Introduce Julie to leaders from other firms about webinars/seminars on marketing strategy. - SET teamwork item for me to do
- Send out an anonymous leadership review questionnaire to the team for feedback on Julie, Nicole, and Lexlee, to support retention and leadership development discussions.
- Provide coaching to Nicole on giving feedback and managing stylistic vs. substantive edits to documents.
- Work with the team to update and standardize templates and document processes, based on feedback from Margo/Julie/Nicole's discussion.

Nicole

- Have conversations with Maddie and Corinne about their recent billable hours, lead with curiosity, and brainstorm ways to increase billables.
- Review Kelsey's admin time entries for the last two weeks to ensure all billable work is being captured and not missed.
- DONE: Send the current error tracking spreadsheet to Lexlee for analysis of error types.
- Outline points to include in the children's video on Julie's estate plans.
- When processing invoices next month, audit all attorneys' and paralegals' flat-fee files (not just Hara's) to assess delays and SKU compliance.
- Break down error types in operations tracking and report back on the most common types and percentages.
- Audit invoices for all attorneys/paralegals (not just Hara) for delays and SKU compliance.
- Track and analyze the most common error types in operations and report back to Lexlee.

Collaboration

- Julie and Nicole: Discuss with attorneys how to handle client communication about money levels/future costs, and incorporate into the strategy call script and workflow.
- Julie/Stacy: Run a report on how much time Nicole spends correcting errors made by attorneys and paralegals.

Summary

New Hire and Employee Updates

Julie reported that three new hires were made: two paralegals and one receptionist. The team discussed Hara's departure, which was initially planned as a performance-based termination but was later changed to a Performance Improvement Plan (PIP) following Julie's recommendation. Lexlee committed to implementing weekly onboarding questions and formal 30-, 60-, and 90-day reviews for new hires, and to conducting an exit interview with Hara.

Revenue Milestones and Legal Wins

The team celebrated several wins, including crossing revenue milestones, with Julie reporting they reached $1 million in 2023, 2024, and 2025 at increasingly earlier dates, and the current run rate indicates they will hit the target in August. Nicole announced a significant victory: Wagner's case was dismissed, which Julie noted was a big win for the entire firm. Nicole also reported successfully signing a trust package consultation with a retired attorney, while Julie shared that Emily had given birth to a baby boy the previous day.

Lead Performance and Revenue Metrics

Julie reported that leads have dropped significantly, from 22 to 9 in recent weeks, which is concerning because paid ads typically end by mid-month. The team discussed their performance metrics, with Julie noting a 46% conversion rate from 24 leads, resulting in 57% total fee conversion for the month. While the firm barely missed profitability targets for April by about $2,000, billable hours are down across the board, and May's revenue is currently at 50% of goals. Lexlee suggested exploring webinar and seminar marketing strategies by connecting with other probate firms in different states.

Billing Performance and Challenges

The team discussed billing hour challenges, with Lexlee noting that while June is on track at 50%, there are concerns about May's performance. They reviewed individual attorneys' performance, finding that Corinne was meeting goals, while Kelsey and Maddie were struggling, with Kelsey showing some improvement, from 9.7 to 15.3 hours in recent months. The discussion highlighted concerns about declining case leads and the need for better follow-up processes, with Emily and Megan working on client follow-ups. Nicole was tasked with reviewing Kelsey's time entries to ensure proper billing for administrative tasks, as Kelsey's admin time was reported at 20.9 hours.

Compliance and Billing Strategies Review

The team discussed compliance and billing issues, with Julie reporting that most flat-fee cases involve estate plans and government accounts, while many estate plan cases are out of compliance. They reviewed strategies for improving billing, including creating welcome calls and scripts for hourly clients, though some of these tasks remain incomplete due to team members being overwhelmed with other responsibilities. The team also addressed tracking errors in document preparation, with Nicole maintaining an Excel spreadsheet of mistakes but needing guidance on analyzing error types and percentages. Next steps include creating a video on estate planning for children, updating templates, and conducting a leadership training session with the team.