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Quarterly Strategic Planning Retreat

April 2025

Honor, Your, Plan.



CHECK-IN

PERSONAL SUCCESSES
PROFESSIONAL SUCCESSES
GOALS FOR RETREAT

ACTION ITEMS

It is important to include both tasks and desired behavioral changes on this sheet. Any items that need to be addressed after the retreat should be documented here.

	TO DO / ACTION	OWNER	DUE DATE	STATUS
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22				
23				



WHAT ARE YOU AIMING FOR?

WHAT WILL YOU BE THINKING AND FEELING ONCE YOU'VE CREATED THIS SUCCESS FOR YOURSELF? WRITE SPECIFIC FEELING STATES YOU ARE FAIRLY CERTAIN YOU WILL BE EXPERIENCING AT THIS FUTURE POINT.

DO SOME ROUGH MATH

DO SOME ROUGH MATH TO FIGURE OUT: WHAT DOES THE BUSINESS NEED TO DO IN TERMS OF REVENUE FOR YOU TO MAKE THE PREVIOUS PAGE A REALITY FOR YOURSELF?

CREATE ANTICIPATION

WHAT IS AN EVENT THAT YOU CAN PUT ON THE CALENDAR THAT WILL PROVIDE ANTICIPATION (I.E. VACATION, CONFERENCE, SABBATICAL)? WHAT NEEDS TO GO ON YOUR CALENDAR TO PREPARE? THINK THROUGH MILESTONES, TRAINING, SYSTEMS, EXPECTATIONS, ETC.



DETERMINE YOUR AVERAGE VALUE PER MATTER (OR CASE, OR FILE)

Calculate your firm's average value per matter - firm-wide, AND for each important practice area or matter type. The value of the matter is what the firm charged for the matter (whether or not it was all collected).

Within a specified date range (last 12 months, for example), use the equations below based on your firm's fee structure.

FLAT FEE: [COMBINED VALUE OF ALL NEW MATTERS] ÷ [# OF NEW MATTERS]

CONTINGENCY: [TOTAL CASE FEES] ÷ [# OF CLOSED MATTERS]

HOURLY BILLING: [COMBINED VALUE OF ALL CLOSED MATTERS] ÷ [# OF CLOSED MATTERS]

NOTE: If you are having trouble getting accurate information to calculate the average value per matter using above formulas, then do the following to get a reasonably close estimate:

[Last 12 months billed] ÷ [# of new matters] *Try to get at least 12 months of data if you're going to go this route to calculate average value per matter

AVERAGE MATTER VALUE
PRACTICE AREA OR MATTER TYPE 1:
PRACTICE AREA OR MATTER TYPE 2:
PRACTICE AREA OR MATTER TYPE 3:
PRACTICE AREA OR MATTER TYPE 4:
PRACTICE AREA OR MATTER TYPE 5:
FIRM-WIDE:

PRACTICE AREA % OF REVENUE

Calculate the percentage of revenue for each practice area or matter type that has contributed in the last 12 months (or pick another time frame that makes sense for your firm).

Practice area (or matter type) revenue ÷ total firm revenue

PRACTICE AREA	PERCENTAGE OF REVENUE				
FRACTICE AREA	CURRENT %	TARGET % (FOR FUTURE)			



WHAT IS YOUR COLLECTIONS RATE?

Within a specified date range (last 12 months, for example), use the equation below to calculate your collections rate.

COLLECTIONS RATE: [AMOUNT COLLECTED] ÷ [AMOUNT BILLED] X 100

When you set goals, if there is a discrepancy between billing and collections, you are going to have to increase your revenue goal to account for the collections rate.

(i.e. \$1M goal, collections rate of 85%, they actually have to hit a billable target of \$1,176,471 in order to collect \$1M (\$1M divided by .85)

The other way is to calculate the average <u>collected</u> per matter. Within a specified date range (last 12 months, for example), use the equations below based on your firm's fee structure.

FLAT FEE: [COMBINED COLLECTIONS OF ALL MATTERS] ÷ [# OF MATTERS]

CONTINGENCY: [TOTAL MATTER COLLECTIONS] ÷ [# OF CLOSED MATTERS]

HOURLY BILLING: [COMBINED COLLECTIONS OF ALL CLOSED MATTERS] ÷ [# OF CLOSED MATTERS]

If your collections rate is 100% there is no need to calculate average collections per matter.

AVERAGE MATTER COLLECTIONS

PRACTICE AREA OR MATTER TYPE 1:

PRACTICE AREA OR MATTER TYPE 2:

PRACTICE AREA OR MATTER TYPE 3:

PRACTICE AREA OR MATTER TYPE 4:

PRACTICE AREA OR MATTER TYPE 5:

FIRM-WIDE:



02 Quarter + Annual Review



QUARTER 1 GOAL REVIEW

	GOAL NAME: FIF	RM REVENUE			
	Q1 GOAL	Q1 ACTUAL To Date	Q1 GAP		
	PRACTICE AREA		Q1 GOALS	Q1 ACTUAL To Date	Q1 GAP
MN					
Breakdown					
В					
	GOAL NAME:				
	Q1 GOAL	Q1 ACTUAL To Date	Q1 GAP		
	PRACTICE AREA		Q1 GOALS	Q1 ACTUAL To Date	Q1 GAP
wn	PRACTICE AREA		Q1 GOALS	Q1 ACTUAL To Date	Q1 GAP
⁻ eakdown	PRACTICE AREA		Q1 GOALS	Q1 ACTUAL To Date	Q1 GAP
Breakdown	PRACTICE AREA		Q1 GOALS	Q1 ACTUAL To Date	Q1 GAP
Breakdown	PRACTICE AREA		Q1 GOALS	Q1 ACTUAL To Date	Q1 GAP
Breakdown	PRACTICE AREA GOAL NAME:		Q1 GOALS	Q1 ACTUAL TO Date	Q1 GAP
Breakdown		Q1 ACTUAL To Date	Q1 GOALS	Q1 ACTUAL To Date	Q1 GAP
Breakdown	GOAL NAME:	Q1 ACTUAL To Date		Q1 ACTUAL TO Date	Q1 GAP
Breakdown	GOAL NAME:	Q1 ACTUAL To Date		Q1 ACTUAL TO Date	Q1 GAP
Breakdown	GOAL NAME: Q1 GOAL	Q1 ACTUAL To Date		Q1 ACTUAL To Date	Q1 GAP

ANNUAL REVENUE GOAL REVIEW

	GOAL NAME: FIR	RM REVENUE			
	ANNUAL GOAL	ACTUAL To Date	ANNUAL GAP		
	PRACTICE AREA		ANNUAL GOALS	ACTUAL To Date	ANNUAL GAP
2					
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ANNUAL BASIC DATA REVIEW

	INCOME		EXPENSES				PR	OFIT	
YEAR	TOTAL FIRM INCOME	PEC	PLE	OVER	HEAD	то	TAL	NET IN	СОМЕ
2025 ACTUAL	\$	\$	%	\$	%	\$	%	\$	%
2025 TARGET	\$	\$	%	\$	%	\$	%	\$	%

ROCK+GOAL REVIEW

ROCK NAME	NAME	DONE
1.		
2.		
3.		
4.		
5.		
6		
7.		

WHAT CONTRIBUTED TO FALLING SHORT AND/OR COMPLETING YOUR ROCKS THIS QUARTER?	

PRODUCER INFO

If neither of the success metrics below are measurable in your firm, then you can measure revenue per attorney evenly to help determine firm health.

Producer Name	Total Investment	Success Metrics		Margin Multiple	
Troducer Name	iotat investment	Hours	Attributed Fees	Waigiii	Muttiple
	\$		\$	\$	X
	\$		\$	\$	X
	\$		\$	\$	X
	\$		\$	\$	X
	\$		\$	\$	X

TAKEAWAYS FROM ABOVE DATA	

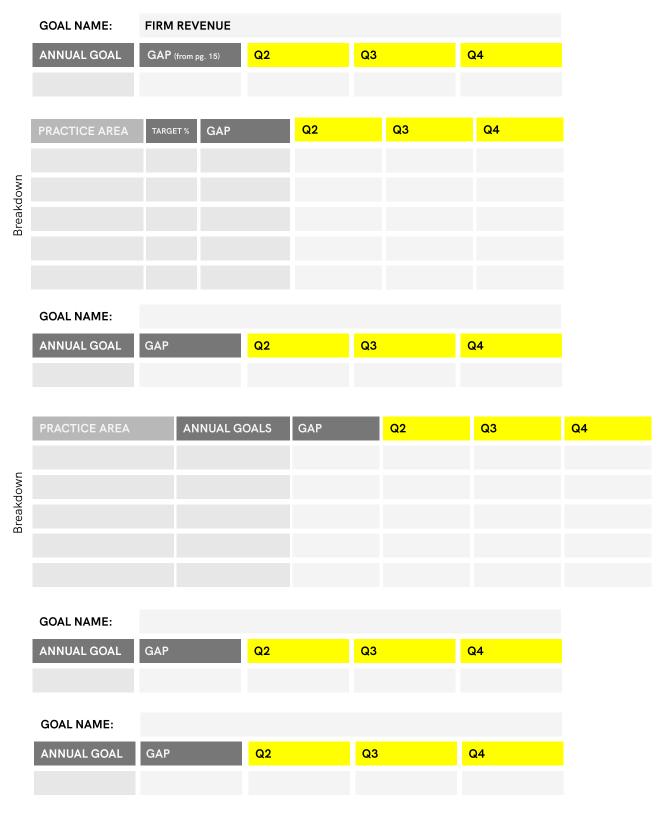
QUARTER REVIEW

ACCOMPLISHMENTS, REALIZATIONS + LESSONS LEARNED	

03 Goals



2025 BREAKDOWN



Q2 BREAKDOWN

	GOAL NAME:	FIRM REVENUE				
	Q2 GOAL	APRIL	MAY	JUNE		
	PRACTICE AREA		Q2 GOALS	APRIL	MAY	JUNE
_						
Breakdown						
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	GOAL NAME:					
	Q2 GOAL	APRIL	MAY	JUNE		
	PRACTICE AREA		Q2 GOALS	APRIL	MAY	JUNE
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	GOAL NAME:					
	Q2 GOAL	APRIL	MAY	JUNE		
	GOAL NAME:					
	Q2 GOAL	APRIL	MAY	JUNE		
		ALINE	IVIAI	OONL		

TRACKING + METRICS

LIST BELOW WHAT NEEDS TO HAPPEN FROM A TRACKING PERSPECTIVE.
Do you need to add a column to your tracker, build a tracker, change an equation, etc.?

04 Rocks

BRAIN DUMP

LOOKING AT YOUR GOALS, WHAT ARE THE THINGS THAT IF YOU DON'T DO THEM, YOU WILL BE HELD BACK?
WHAT BARRIERS DO YOU ANTICIPATE ALONG THE WAY TO YOUR GOALS? PLEASE CONSIDER VACATIONS,
HOLIDAYS, AND SIGNIFICANT EVENTS ON YOUR CALENDAR.

BRAIN DUMP

HOW CAN YOU LIGHTEN OR ELIMINATE THE IDENTIFIED BARRIERS?	
WHAT ARE SPECIFIC EFFORTS OR PROJECTS THAT COULD ACCOMPLISH YOUR IDEAS ABOVE?	
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NOTES





ROCKS

QUARTERLY ROCKS	WHO
1	
2	
3	
4	
5	
6	
7	

OTHER IMPORTANT INITIATIVES (That I'd like set in motion by my team)
1
2
3
4
5
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9
10

BREAK DOWN YOUR ROCKS	TIME

BREAK DOWN YOUR ROCKS	TIME

BREAK DOWN YOUR ROCKS	TIME

BREAK DOWN YOUR ROCKS	TIME

BREAK DOWN YOUR ROCKS	TIME

BREAK DOWN YOUR ROCKS	TIME

05 Integration

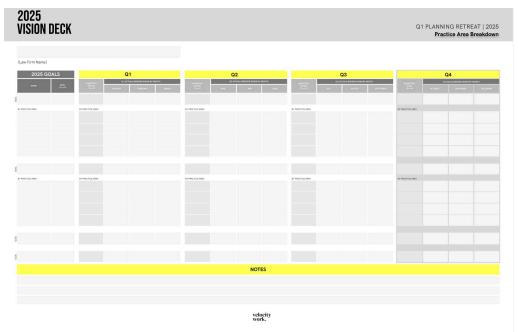
USING YOUR WORD OF THE YEAR

HOW WILL THE DIFFERENT ASPECTS OF YOUR BUSINESS (AND THE PLANS YOU'VE MADE HERE TODAY) BENEFIT FROM YOU LEADING WITH YOUR WORD OF THE YEAR?
WHAT WILL YOU DO TO ENSURE THAT YOUR WORD OF THE YEAR DRIVES YOUR FOCUS?
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VISUALIZATION

SPEND A FEW MINUTES VISUALIZING YOURSELF MOVING THROUGH THE DAYS AND WEEKS OF YOUR QUARTER. VISUALIZE WHAT IT'S GOING TO BE LIKE TO HONOR YOUR PLAN. THE BARRIERS YOU'LL FACE AND THE URGES YOU WILL EXPERIENCE (EXTERNAL AND INTERNAL) TO VEER FROM YOUR PLAN. WHAT IT WILL BE LIKE TO ACTUALLY HONOR YOUR PLAN, AND NOTE THE FEELING OF ACCOMPLISHMENT BECAUSE YOU HONORED YOUR PLAN.
WHAT CAN YOU DO TO SET YOURSELF UP TO WIN AT THIS GAME OF HONORING YOUR PLAN?

GRAB YOUR VISION DECK AND FILL IT IN BASED ON ALL THE PLANNING YOU JUST DID





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ACTION ITEM SUGGESTIONS

то	DO/ACTION	STATUS
1	Update metrics tracker	
2	Hang Vision Deck somewhere I see it every day	
3	Finish deconstructing all Rocks	
4	Calendar support to keep me on track (coaching calls)	
5	Calendar focus time for Rocks	
6	Submit Rocks to Velocity Work for accountability	
7	Schedule meeting to communicate what comes out of this retreat	
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velocity® work.