

## Managing Attorney Revenue Guide

### Objective:

The primary goal of the Managing Attorney is to work closely with the Communications team in their office to identify and capitalize on revenue opportunities. This requires strategic planning, proactive engagement with team members, and a focus on maximizing potential revenue sources.

### Key Responsibilities:

#### 1. Know & Track Your Revenue Goals

- You must know your **revenue goal at every level**—yearly, monthly, weekly, and daily.
- Track progress **daily** with an eye toward **exceeding your targets**.
- Break down your **yearly goal mathematically**:
- What is your **monthly revenue target**?
- How does that break down into a **weekly target**?
- What is your **daily revenue target**?
- By tracking these goals daily, you will **open your eyes to new opportunities** and ensure you are consistently taking action to **meet and exceed expectations**.

#### 2. Weekly Revenue Planning & Follow-Up

- Collaborate with the **Communications team** to review the **Revenue Follow-Up Log** and identify opportunities.
- Go over the **weekly schedule** with Communications and pinpoint weak appointment days.
- Take immediate action to fill gaps by looping in the **Communications Director** to explore additional lead sources, including:
  - Past seminar attendees
  - Social media leads
  - Canceled appointments that may be rescheduled
  - Other sources from firm marketing efforts

#### 3. Daily Team Meetings & Revenue Opportunities

- Engage with the entire **team (Communications, Paralegals, and Attorneys)** during morning meetings to uncover additional revenue streams.
- Consider opportunities across different departments:
- **Probate:** Are there cases awaiting actions, direction, or a court order for commissions/fees?
- **Benefits:** Are there additional services the client may need?
- **Litigation:** Are there cases that could benefit from further legal action or expanded representation?
- **Estate Planning:** Has the client's situation changed, requiring additional planning?
- **Be proactive:** Look at current cases and ask: *Are there additional needs and services that have not been offered or that have developed over the life of the case?*
- **Stay opportunity-focused:** Every month, week, and day presents chances to increase revenue. Managing Attorneys must be open and willing to spot these opportunities and take decisive action to secure them.

#### 4. Maximizing Consultations & Client Conversions

- **Active Listening & Strategic Guidance**
- Attorneys should **listen closely** to clients and maintain a **positive attitude and strong rapport**.
- **Consult with the attorney team** as needed. Stepping out to call another attorney for guidance or using **Google Chat** to discuss legal strategy is encouraged.
- A **clear and decisive solution** should be presented to the client by the end of the consultation.
- **Seamless Handoff to Communications**
- **All consultation notes and documents** must be emailed to the Communications team **immediately** after the consult.
- **Communications will prepare the Fee Agreement & Client Engagement Letter** and present it to the prospective client.
- Communications is **directly tied to revenue goals** and is highly skilled in ensuring clients move forward with services.
- **DO NOT fail to pass off a potential client** to Communications at the end of each appointment (in-person, phone, or virtual). This is a **critical part of our process** and key to achieving revenue targets.

#### 5. Time Tracking & Billing Accuracy

- Ensure all team members are **accurately logging time** toward cases.
- Proper time tracking ensures:
- **Accurate client billing**
- **Appropriate compensation for work performed**
- **Increased revenue for the office**
- This process must be followed to ensure all work is **properly recorded and billed according to client agreements**.

#### 6. The Element of Being Unreasonable

- There will be days when revenue and clients seem uncertain. On those days, the Managing Attorney must enter with an **unreasonable level of expectation and diligence**—a **sense of urgency** is key to making success happen.
- Call potential clients, assemble the team, and rally them for all opportunities. **Motivate the Communications team** to turn over every rock, call every lead, and generate new appointments.
- **This energy and drive are contagious.** When you pour your heart and soul into this effort, the team follows, and the result is greater than what was put in. It generates not just a great revenue day but weeks and months of success.
- **Clients sense passion and commitment.** When they see you care deeply about them, the business, and your family, they become a part of that mission. **That belief and drive are the key ingredients above and beyond the process—it is the process.**

#### Final Thoughts:

Revenue growth is a **team effort**, and Managing Attorneys play a crucial role in **identifying opportunities, driving strategy, and ensuring execution**. By staying engaged with

Communications, Paralegals, and the Attorney team, we can maximize every opportunity to **meet and exceed revenue goals.**