



# ON THE SAME PAGE PLANNER™ LAWYER LIFE PLAN

## VISION & VALUES

*Business ideas become realities  
for many good people*

- Moral virtue
- Hard work
- Forthrightness

## CAREER MISSION

Develop a highly effective practice team to create world class public/ private partnerships

- Autonomy/ ample time to think through
- Involve in “cutting edge” concepts
- Put puzzle pieces together
- Clear mission/ objectives/ measure success
- Friendly supportive partner/ boss

## ASSUMPTIONS

- Exercise your ability to choose
- He who serves well/ profits well
- Frugal with money, make it for you
- Excellence in everything
- Life long learning- continue education
- Delete bad habit and replace quickly w/ good habit

## STAKEHOLDERS

- **Spouse**- Create a feeling of romance and strength
- **Kids**- Teach life values by my life example/ invest in play time/ model acts of service
- **Clients**- Provide excellent work in a timely efficient manner
- **Community**- Focus on building business and community service will come as it will
- **Me**- Be a spiritual person as a father and husband and find the right balance to make my life and family the best in each seasons
- **Support Staff**- To encourage and reward the development of systems and processes to free me up and increase staff billing time
- **Top Level**- To build stronger business relationships through understanding their needs and keeping them up-to-date on my future plans
- **Clients-Referral Attorneys**-To build selected relationships on a personal basis, actively capitalize on referral opportunities

## OBJECTIVES

	02	03	04
Total Billing	800K	1M	1.5M
Real estate	125K	200K	250K
Knowledge	125K	200K	250K
Employment	150K	250K	350K
Healthcare	150K	175K	205K

## S.W.O.T ANALYSIS

### STRENGTHS

- Likeable/ put people at ease
- Competent/ expert in my field
- Sales/ entrepreneurial bent
- Relationship building
- Legal experience
- Innovative, intuitive, judgment
- Good with numbers

### WEAKNESSES

- Burdened with details - not follow through/ worry
- Trouble concentrate on task at hand/ too many ideas
- Can be too unconventional and avoid formal control/ structure

## OPPORTUNITIES

- Virtual office
- Hire executive assistant
- Seminars with spouse
- Regional development
- American Bar Association

## THREATS

- Staff overloaded- turnover
- Family time limited
- Spouse wants to keep up with the Jones's
- Relationship with partners/ firm approval of my vision
- Someone taking your market niche

## KEY DECISIONS

“Fluidity of life and work”

**Over Controlling/ Delegating** – I will change my environment to be more hands off and utilize my resources smarter

**Family First** – I will demonstrate my commitment to my family. Strengthen connection w/ spouse and kids