

# 2024 LAW FIRM GOALS

## CREATING A GROWTH PLAN

December 5, 2023  
Josh Dorcsey



# JOSH DORCEY

## ATTORNEY & ADJUNCT PRACTICE ADVISOR

- Josh Dorcey is the founder and managing partner of Dorcey Law Firm, PLC, a Florida based firm focusing on Estate Planning, Business Planning, and Asset Protection
- Josh has been a part of Atticus since 2013 and is an Adjunct Practice Advisor coaching other attorneys. Atticus has provided Josh a place for growth, inspiration, and accountability
- Josh loves the great outdoors and can be found relaxing on a body of water and enjoying time with his beautiful wife and two daughters





ATTICUS™  
*Great Practice. Great Life.*

# ABOUT US

We help lawyers grow great practices and cultivate great lives

# HELP US GROW: CONNECT AND SHARE

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# MORE THAN JUST BEING GREAT AT THE LAW



# THE GROWTH CORNERSTONES™

REVENUE, INCOME, CONTROL, FREEDOM AND IMPACT



Sharpening Focus



Attracting High Value  
Clients



Building  
a Great Team



Cash Flow  
and Profitability

LEGAL SKILLS


# OUR GOALS TODAY

GOAL  
**1**



Learn from 2023  
Plan for 2024

GOAL  
**2**



Understand the  
fundamentals of  
S.M.A.R.T goals

GOAL  
**3**



Start growing your  
practice in the next 24  
hours

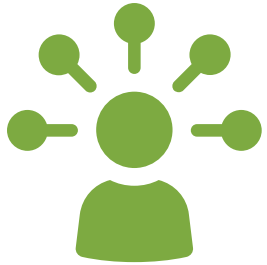
# SETTING GOALS: A BUSINESS SKILL

## But I am not a goal setter:

- Possibly, you never learned how to, or you tried it once, and it didn't work, or being accountable for your future is too scary.
- "I don't have time to work on goals; answering emails alone fills my day. What's the point?"
- I suck at this!
- I am a failure because I failed at my goals. If I don't do goals, I can't fail.



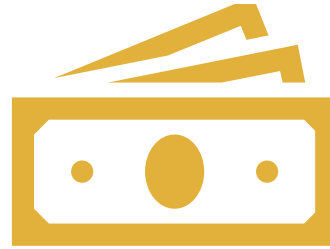
# GOAL SETTING FOR YOUR GREAT PRACTICE



Building skills for growth?



Building a great team?



Increasing revenue?



Taking time off?



Increasing referrals?

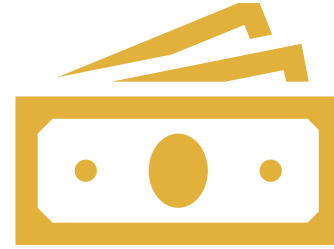
# GOAL SETTING FOR YOUR GREAT LIFE



Professional



Personal



Financial



Health



Spiritual



Social



Mental



Family



# GOAL #1

LEARN FROM 2023  
PLAN FOR 2024

# THE EVALUATION PROGRESS

What's working?

What isn't?

What did you learn?

How will you improve based on what you learned?

# THE LEARNING BRIDGE™

## The Learning Bridge™ : Top 3



Name: \_\_\_\_\_ Date: \_\_\_\_\_

What Worked?		What Did Not Work?	
What	Why	What	Why
Top 3 Lessons Learned			
What I Learned		How Can I Improve	
1			
2			
3			
Top 3 Ways I Can Improve My Performance			

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# THE LEARNING BRIDGE™ SAMPLE

## THE LEARNING BRIDGE™: TOP 3

Name: Steve Date: today

WHAT WORKED?		WHAT DID NOT WORK?	
WHAT	WHY	WHAT	WHY
Improved my health and fitness over the past 90 days.	Increased my confidence and health. I feel better about myself and have more energy.	Jessica quitting without notice.	Hurt us on many projects. We are struggling to replace her and keeping momentum.
Hiring Kathleen and promoting Samantha!	The quality of our team and growth is correlated in my mind. The more allstars the greater impact.	Struggling with accuracy of dash boards. Too much confusion of definitions.	Lack of standard operating procedures for new process. Learning while doing.
Summit was amazing.	350 clients coming together learning and celebrating their successes! Plus planning for 2022.	Parenting and Practicing not getting the traction I had hoped.	Not sure. I think attorneys with young kids are the most stressed and time pressured. Need help.
Top 3 LESSONS LEARNED			
WHAT I LEARNED		HOW CAN I IMPROVE	
1 I am recovering from surgery quicker than I thought. Most keep my health at forefront.		Would like to see body fat down below 15% by 1st quarter while increasing muscle mass.	
2 Kathleen needs more support.		We need to be guesstimating what we will need about 6 months out.	
3 Parenting and partnering-maybe too big of a bite for clients.		Reboot and see if we can do in smaller learning segments.	
TOP 3 WAYS I CAN IMPROVE MY PERFORMANCE			
Stay focused on my health and fitness. Keep driving on strength training and benchmarking weekly. The stronger and more confident I feel, the more I can help implement change in the company.			
Keep pushing Kathleen to let go, hire and delegate. She needs more talent on her team. We have some talented folks and we need more.			
Test more. The parenting and practicing curriculum makes sense. But, it maybe the delivery model is too big. Smaller bites more often vs. a workshop.			

SMART Goals

Specific

Measurable

Achievable

Realistic

Timely

## GOAL #2

UNDERSTAND THE FUNDAMENTALS OF S.M.A.R.T. GOALS

# THE ATTICUS CHANGE FORMULA™







# WHY IS IT WORTH IT?

- Understand your why: focus and momentum
- Self-mastery and control: “The future is mine to create—I choose to make it great, or not.”
- Create new behaviors, develop new skills
- You can’t manage what you don’t measure
- Maximize results
- Learn from goal setting
  - ✓ What worked
  - ✓ What didn’t
  - ✓ Ideas for improvement

# DEVELOP S.M.A.R.T. GOALS

Specific

Measurable

Achievable

Reasonable

Timeline



## GOAL #3

START GROWING YOUR PRACTICE IN THE  
NEXT 24 HOURS

# PROTECT YOUR TIME OFF



Kids school  
calendar



Your key  
vacations

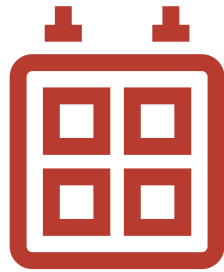


Significant family  
events



Health and  
wellness

# PLAN OUT YOUR MARKETING CALENDAR FOR THE YEAR



Do you have a season to your practice?



Do you have a workshop schedule?



What about your marketing goals?

# BLOCK OUT PROJECT TIME



Projects planning  
time needs to be put  
on the calendar



The projects can be  
“plugged in” and  
named later

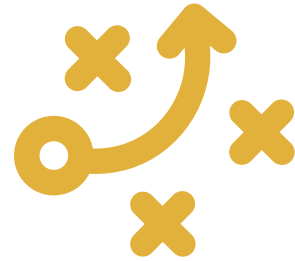


You are protecting  
time for them now

# PLAN YOUR CELEBRATIONS IN DECEMBER 2024



What are the  
3 things you want to be  
celebrating at the  
end of next year?



How will you  
get there?



When will you start  
planning?



## WHAT TO DO NEXT:

Discuss your goals, your “why” and your growth plan with our member service team

- Check the chat box
- **Schedule your free consultation**
- Join us for our 90-minute extended conversation on law firm goals – December 18, 2023, on ZOOM



# UPCOMING WORKSHOPS AND PROGRAMS



## THE PRACTICE GROWTH PROGRAM®

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San Francisco  
Orlando



## S.M.A.R.T. GOALS FOR 2024- LEVEL UP YOUR LAW FIRM

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December 18th, 2023, ZOOM



## MASTERING PRODUCTIVE FOCUS FOR THE BUSY ATTORNEY

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January 9, 2024, ZOOM

# FINAL THOUGHTS AND QUESTIONS?

Thank You!



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