

Select date range

Executive Summary

REVENUE	ACTIVE MATTERS	AVG MATTER VALUE	AVG CYCLE TIME (days)	INTAKE to RETAINER	REALIZATION RATE	STALLED MATTERS
\$5.71M	86	\$19.85K	115	18.39%	75.82%	12

Key findings & recommendations

**! Combined Impact Summary**  
 Combined projected upside is approximately \$1M+ in new and recovered revenue at zero incremental marketing spend, contingent on the operational changes proposed. The growth findings carry longer realization timelines; the recovery findings produce cash flow immediately. Forecasted result: ~\$1M+ combined upside / recovery findings actionable in 30 days.

**1 Intake Conversion**  
 18.4% of inquiries convert to a retainer. Warm leads convert at 39.2%; cold leads at 11.5% — a 3.4x gap. Four operational changes: paid consultation fee, 24-hour follow-up cadence, standardized consultation guide, pre-consultation email.  
**+\$711K retained revenue + \$49K direct consultation**

**2 Lead Sources**  
 \$59K spend on the firm's two worst-converting paid channels — Google Ads (8%) and Facebook (9%) — while its two best channels run on goodwill: past-client referrals (40.8%) and attorney referrals (37.3%) cost nothing. Build the referral cadence first, then cut Google Ads by 50%.  
**-\$42K Y1 Positive**

**3 Matter Profitability**  
 Adoption is the firm's most profitable matter type at 19.29% margin but smallest by volume (6 matters, 17 below median). Divorce - Uncontested is the only loss-maker at -0.15% across 49 matters. Productize both with flat-fee packages.  
**\$4,600 GP per Adoption | \$731.75+ per Uncontested Divorce**

**4 Stalled Matters**  
 12 stalled matters, WIP: \$339K— 19.6% of active-matter revenue, a 14% stall rate. 10 of 12 are Divorce - Contested (\$292K concentrated). Weekly stalled-matter review led by the senior paralegal, 48-hour client status emails on stalled matters, written escalation path when opposing counsel goes silent.  
**~\$170K**

**5 Timekeeper Realization**  
 Two timekeepers fall below their role cohort averages — with stalled matters excluded, these gaps reflect billing behavior, not external delays. Conduct a 60-day write-down audit, weekly 15-minute bill-review meetings, 90-day re-measurement checkpoint.  
**~\$105K**

# Where are clients coming from?

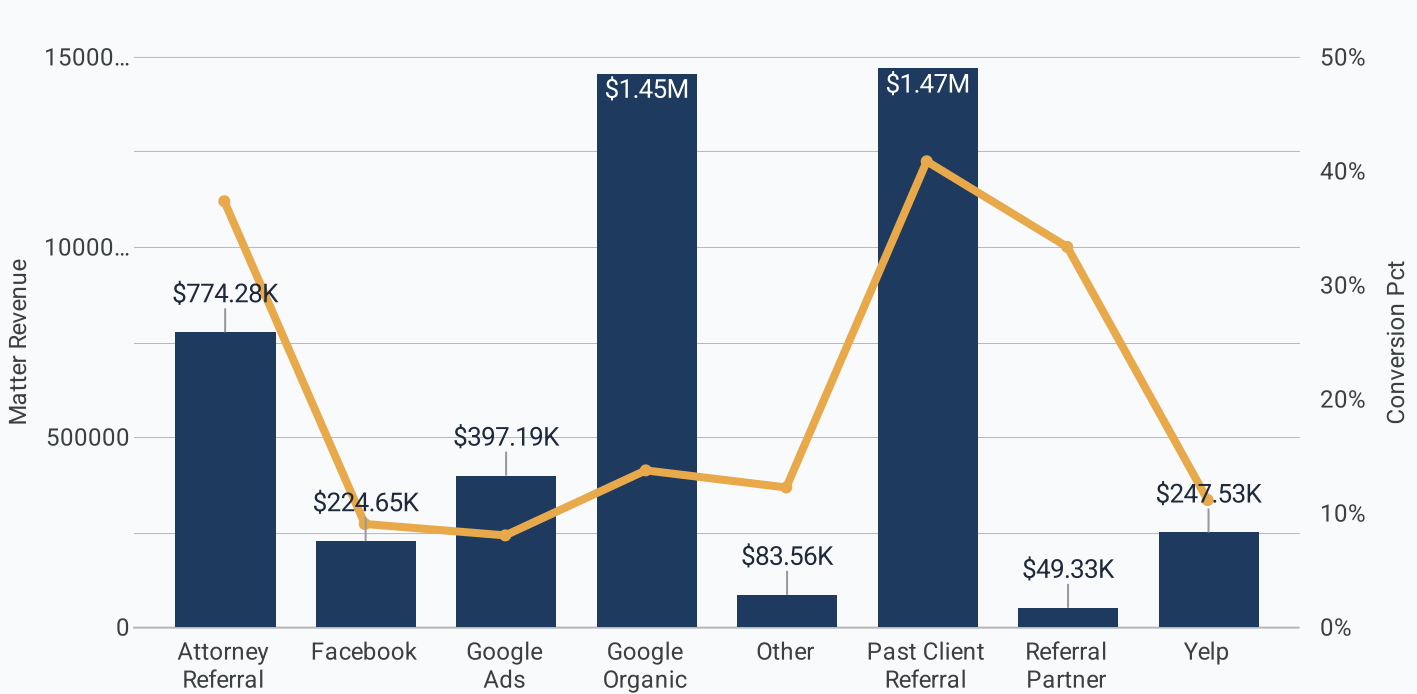
## Lead source breakdown

Lead Source	Matter Count	Matter Revenue	Conversion Pct	Annual Spend	ROAS
Past Client Referral	78	1,468,059	41%	0	0
Google Organic	75	1,454,300	14%	0	0
Attorney Referral	50	774,280	37%	0	0
Google Ads	20	397,191	8%	50,814	7.8
Yelp	9	247,532	11%	4,802	51.6
Facebook	9	224,646	9%	8,086	27.8
Other	5	83,564	12%	0	0
Referral Partner	3	49,331	33%	0	0

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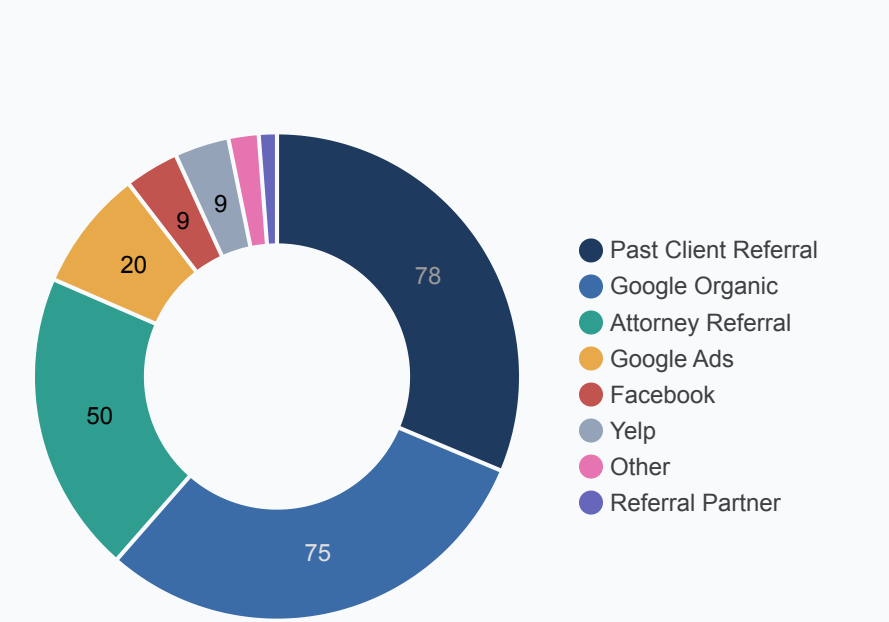
## Revenue and conversion

Matter revenue and inquiry-to-retainer conversion %



## Lead source mix

249 retained matters



# Matter Profitability

## Matter Type breakdown

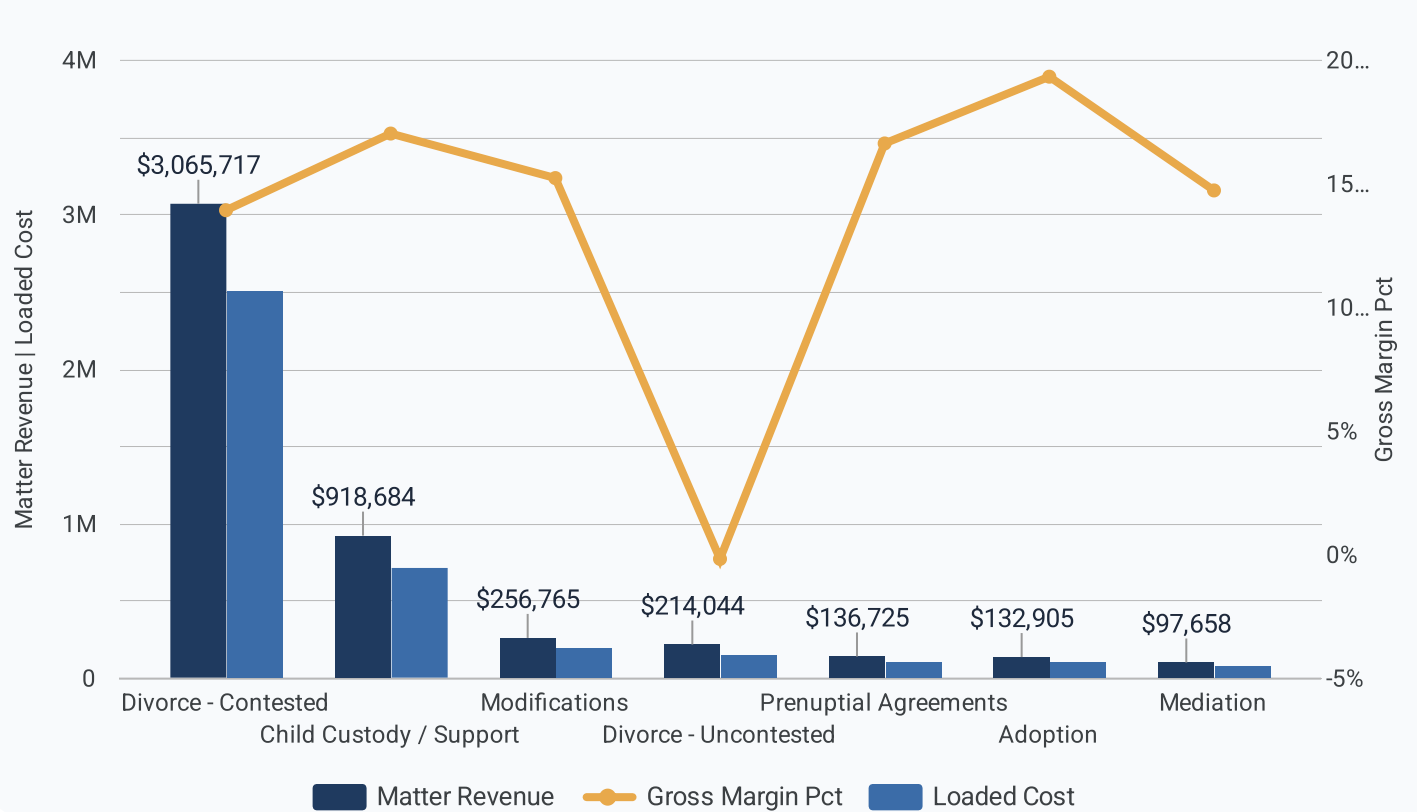
Blended firm gross margin: 14.2%

Matter Type ^	Matter Count	Matter Revenue	Hours	Loaded Cost	Gross Margin	Gross Margin Pct
Adoption	6	\$132,905	481.8	\$103,308	\$25,635	19.30%
Child Custody / Support	45	\$918,684	4,066.1	\$709,470	\$156,515	17.00%
Divorce - Contested	107	\$3,065,717	13,349.7	\$2,499,133	\$426,935	13.90%
Divorce - Uncontested	49	\$214,044	928.1	\$148,575	-\$331	-0.20%
Mediation	13	\$97,658	323	\$73,350	\$14,393	14.70%
Modifications	23	\$256,765	1,013.7	\$193,455	\$39,034	15.20%
Prenuptial Agreements	11	\$136,725	478	\$101,333	\$22,756	16.60%

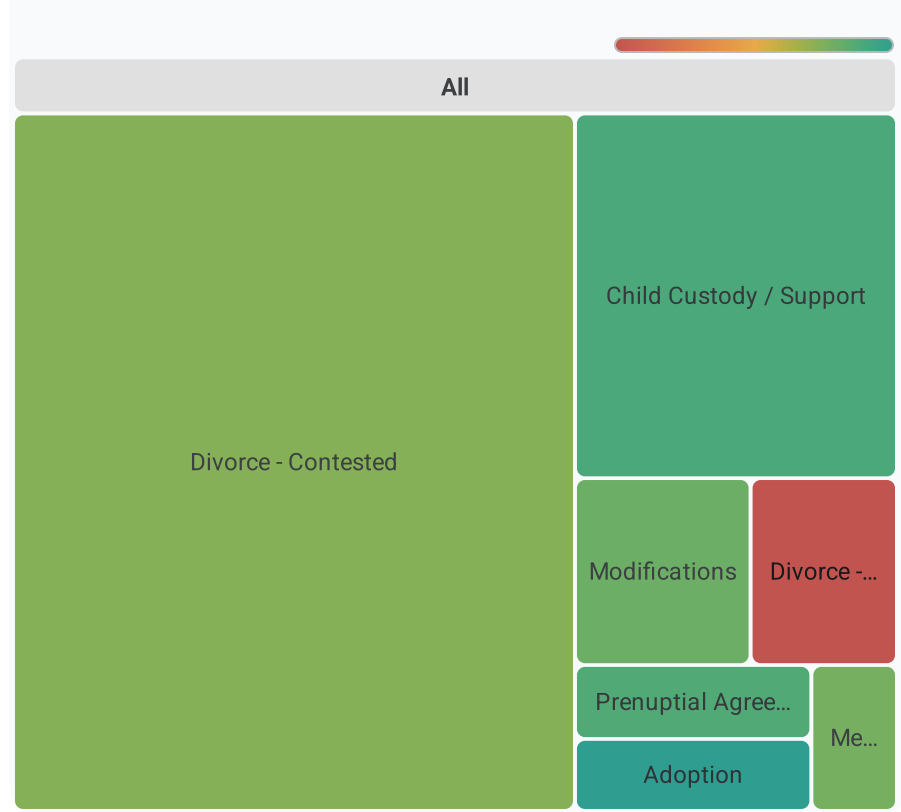
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## Profitability by Matter Type

254 matters opened in the period



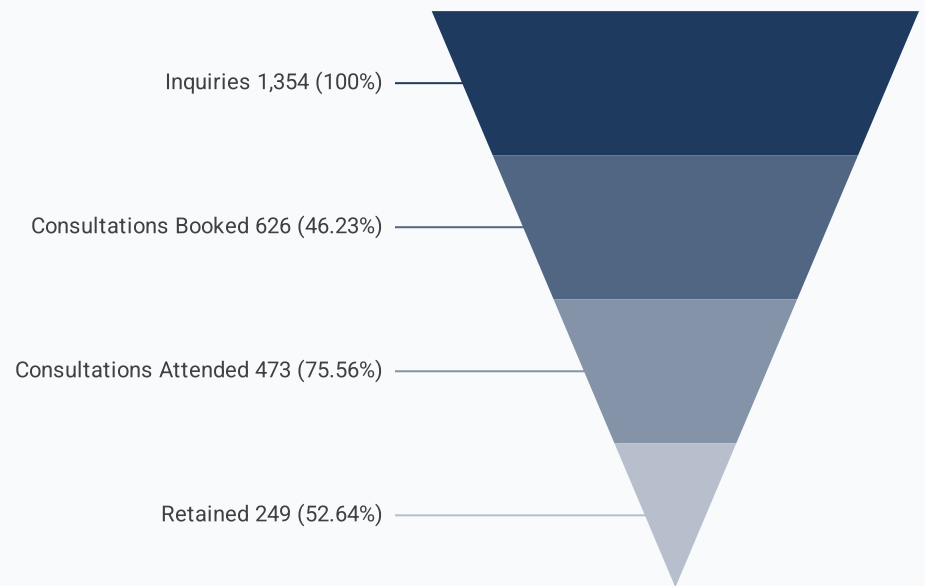
## Profitability Treemap



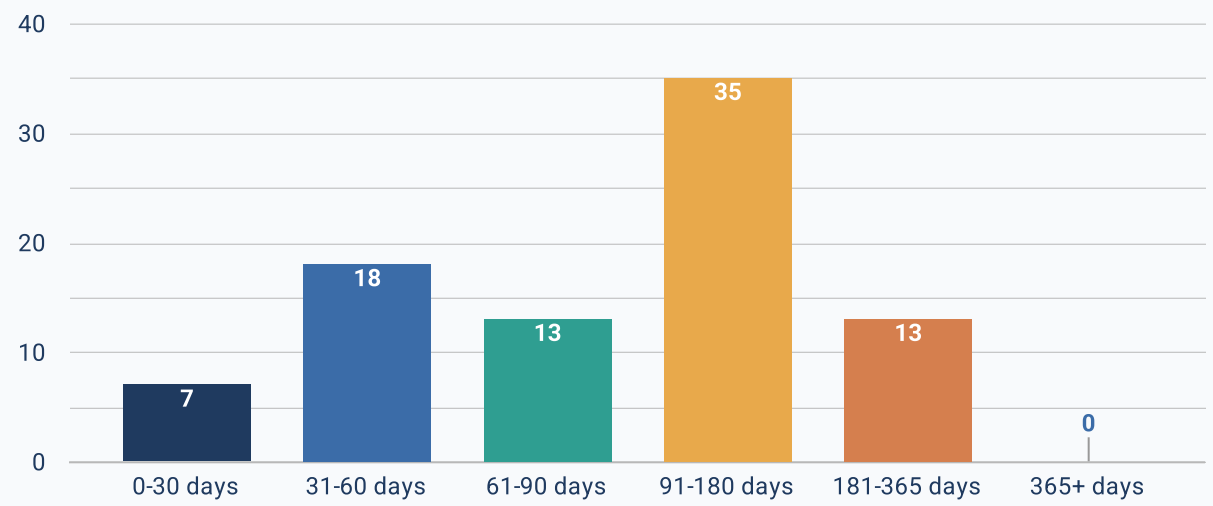
# Intake and Matter Health

## Intake funnel

Inquiry → consultation → retained client



## Active matter aging



**12 matters · \$339K WIP**

## Stalled matters

\$339k across 12 active matters · No activity in 30+ days

Matter ID	Matter Type	Attorney	Last Activity	Days Since Last Activity	WIP
MTR-1013	Divorce - Contested	Maria Chen	Dec 31, 2025	90	\$35,449.67
MTR-1037	Divorce - Contested	Maria Chen	Dec 31, 2025	90	\$22,184.87
MTR-1127	Divorce - Contested	Tom Brennan	Jan 1, 2026	89	\$46,804.73
MTR-1124	Divorce - Contested	Tom Brennan	Jan 3, 2026	87	\$37,600.27
MTR-1188	Child Custody / Support	Susan Reyes	Jan 9, 2026	81	\$25,102.08
MTR-1057	Divorce - Contested	James O'Donnell	Jan 10, 2026	80	\$19,541.45
MTR-1034	Divorce - Contested	Susan Reyes	Jan 13, 2026	77	\$34,782.5
MTR-1022	Divorce - Contested	Maria Chen	Jan 23, 2026	67	\$27,404.65

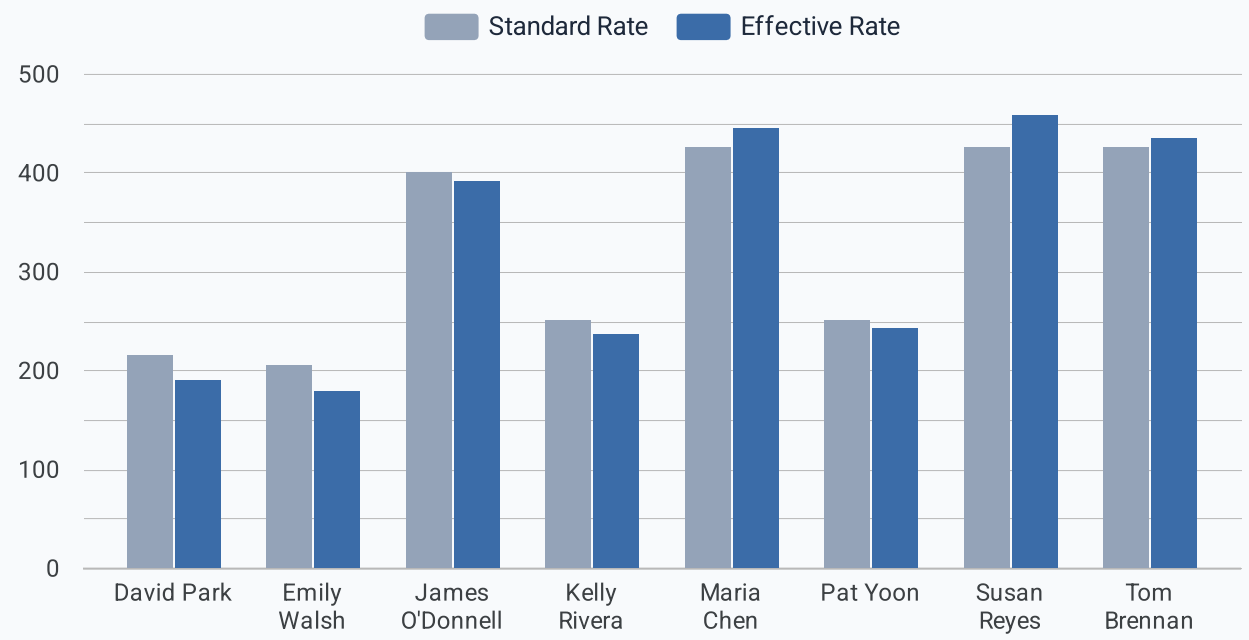
# Timekeeper Performance

## Timekeeper realization

Name	Role	Billable Hours	Billed Amount	Collected Amount	Realization Pct	Realization Gap ▲	Effective Rate
James O'Donnell	Partner	2,489	995,600	779,485	78.30%	-4.3	313
Kelly Rivera	Associate Senior	3,160.2	790,050	597,596	75.60%	-1	189
Tom Brennan	Partner	2,567	1,090,975	894,186	82.00%	-0.7	348
Emily Walsh	Associate Junior	3,237.1	663,606	461,343	69.50%	-0.6	143
David Park	Associate Junior	3,019.9	649,279	459,505	70.80%	0.6	152
Pat Yoon	Associate Senior	3,050.8	762,700	592,268	77.70%	1	194
Maria Chen	Partner	2,489	1,057,825	886,762	83.80%	1.2	356
Susan Reyes	Partner	2,472.9	1,050,983	906,257	86.20%	3.6	366

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## Std Rate v Effective Rate



## Revenue mix

\$5.57M period revenue

