

Sample Dashboard "B"



FORM 7.05

For the Month of: _____, _____

REVENUES			
Billings for the 15 th of this Month:		Amount Collected this Month:	
Fee Billing	\$	Fee Income	\$
Costs Billing	\$	Costs	\$
Interest Billing	\$	Interest	\$
TOTAL:	\$	TOTAL	\$

HOURS BILLED PER ATTORNEY			
	billed		(hrs.)
	billed		(hrs.)
	billed		(hrs.)
	billed		(hrs.)
	billed		(hrs.)

EXPENSES	
Fixed Expenses	\$
Variable Expenses	\$
Client Reimbursed	\$
Payroll	\$
Payroll Taxes	\$
TOTAL	\$

ACCOUNTS RECEIVABLE	
Aging Summary on 1st	\$
Aging Summary on 31st	\$
Amount over 90 days	\$
Amount over 60 days	\$
Amount over 30 days	\$
Amount Current	\$

MARKETING STATS	
Activities:	Referral Source/Client:
Referred by:	Type of Case

NEW BUSINESS	
# of Inquiry Calls	
# of Initial Consults	
# of Rep Ltr Mailed/Del	
# of New Matters	
# of Matters Closed	
Open Inven of Matters	

FINANCIAL OPERATIONS	
Operating Account Balance at month end:	\$
Cash requirements for expenses next month:	\$
Trust Transfer as a % of monthly billings:	\$
Fixed & Variable Expenses as a % of Fee Income:	\$
Income Statement Net Income Balance:	\$