FitzGerald & FitzGerald, P.C.												
Operating Plan												
For the year ended December 31, 2019												
	January	**February**	**March**	**April**	**May**	**June**	**July**	**August**	**September**	**October**	**November**	**December**
Employee												
Employee skill assessments					TRF							TRF
Employee evaluations/compensation												TRF
Continuing Education					20%	40%	60%	80%	100%			
Team Brainstorming Day					All						All	
Marketing												
Detailed Client Improvement Plans					40%	20%	20%	20%				
Business Building Seminar			Yes			Yes			Yes	Big Seminar		
Weekly Business Idea	Weekly	Weekly	Weekly	Weekly	Weekly	Weekly	Weekly	Weekly	Weekly	Weekly	Weekly	Weekly
Website - F&F								Kevin				
Youtube Channels F&F								Kevin -10	2	2	2	2
Referral Source Lunch Meetings	2	2	2	0	5	5	5	5	5	5	5	5
Operating												
Balanced Scorecard	All	All	All	All	All	All	All	All	All	All	All	All
Client Systems Improvements					Team	Team	Team	Team	Team			
BGR session	x	x	x	x	x	x	x	x	x	x	x	x
Quarterly F&F Advisory Board	Yes			Yes			Yes			Yes		
Weekly/Periodic Team Training	Tax				Skills				Planning			
Work Flow Monitoring	Kathy	Kathy	Kathy	Kathy	Kathy	Kathy	Kathy	Kathy	Kathy	Kathy	Kathy	Kathy
Monthly Management Meeting	TRF	TRF	TRF	TRF	TRF	TRF	TRF	TRF	TRF	TRF	TRF	TRF
Compliance Production	10%	35%	65%	90%	95%	100%						
Financial												
Develop breakeven sales numbers	TRF											
Prepare cash flow forecasts	TRF			TRF			TRF			TRF		
Analyze monthly financial statements	TRF	TRF	TRF	TRF	TRF	TRF	TRF	TRF	TRF	TRF	TRF	TRF
Annual review of client profitability										TRF		
Weekly Kpi/WIP/Receivable monitoring	Kathy	Kathy	Kathy	Kathy	Kathy	Kathy	Kathy	Kathy	Kathy	Kathy	Kathy	Kathy