



Implementation Plan & Order of Execution

Geller Profit Blueprint · Law Offices of Robert M. Geller, P.A. × Iron Noodle

Prepared for Robert M. Geller & Helene Geller · June 2026 · Confidential

THE SITUATION

The Numbers That Matter

\$7.10M

TOTAL REVENUE (+35% YOY, FROM \$5.76M)

2,839

CLIENTS HIRED

1,792

CASES FILED

1,046

HIRED, NEVER FILED (36.9%)

\$2.26M

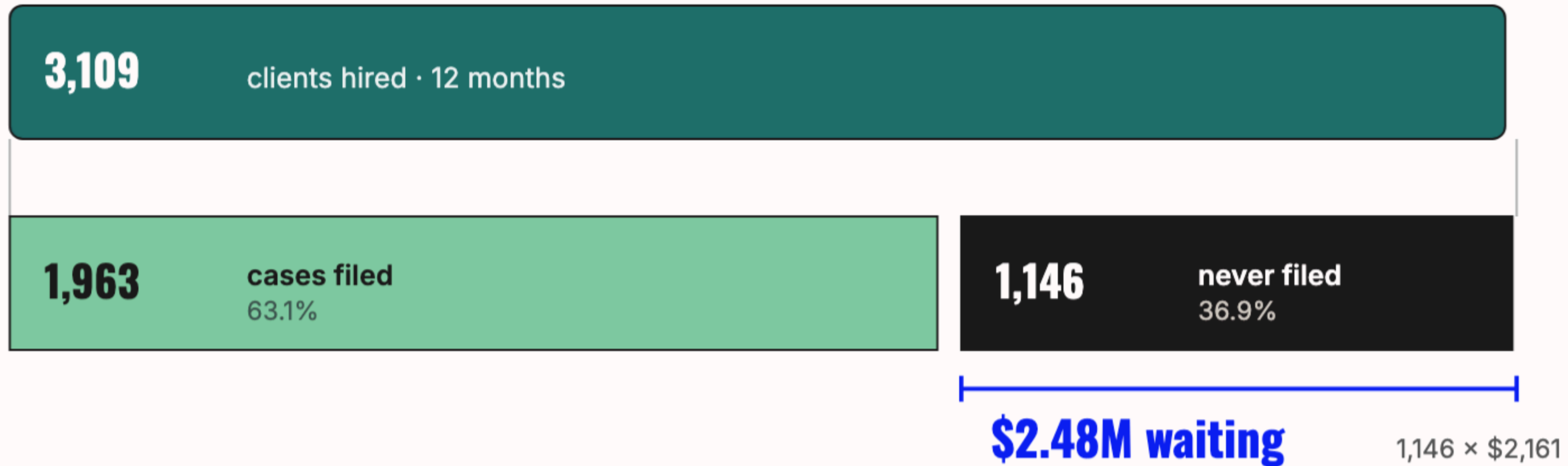
REVENUE SITTING IN PIPELINE

21

MANUAL TRACKERS RUNNING THE FIRM

12 months ended March 31, 2026 — from your P&L, your case management system, and your staff's own words. No guesses.

Where the Revenue Stops



Every hired client lands in one of two places: filed, or waiting. $1,146 \times \$2,161$ blended average case value = \$2.48M between the hire and the courthouse.

DIAGNOSIS

Geller is not a broken firm. It is a control problem hiding inside a successful firm.

Money moves through exception paths

Bounces, ACH failures, chargebacks, refunds, old balances, payment plans — no single finance control center.

Onboarding is a relay race

Contract, signature, payment setup, folders, and case file setup are one business event handled as five clerical tasks.

Spreadsheets carry the firm's memory

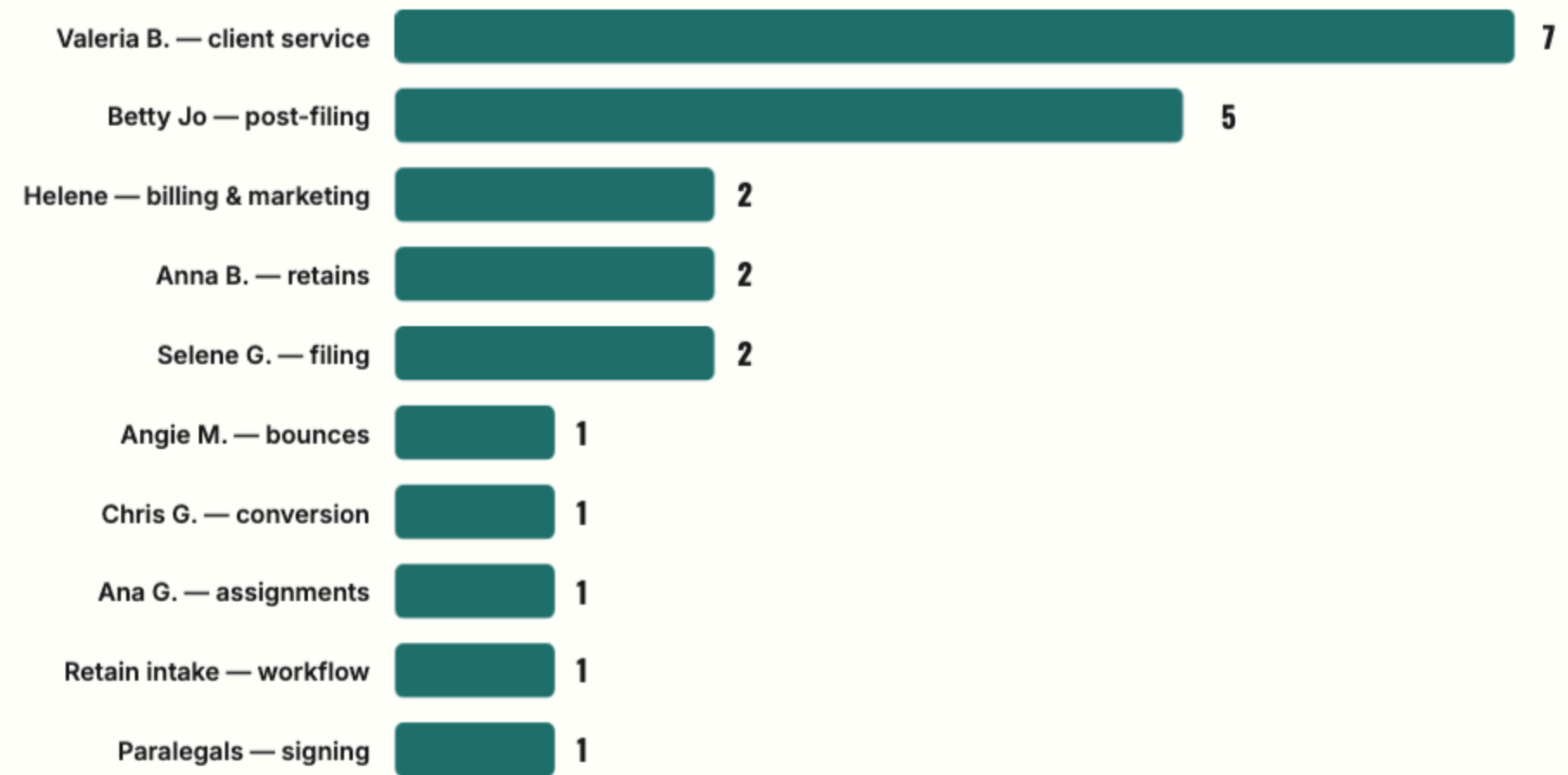
23+ manual trackers across 10 owners decide what happens next in billing, filing, client service, and 341 work.

The constraint is not leads or attorneys. It is the space between the hire and the filing.



THE EVIDENCE

Who Is Carrying the Trackers



When one person owns seven operating trackers, that person is a department. All 23 are itemized in the Blueprint's evidence matrix.

THE PLAN

The Order of Execution

Aligned with David Minckiewicz (Detroit Software Solutions, Zoho engineer), May 18. Each week ships one working system — no big bang.

Week 1

Document collection

GetDocs live — every department's #1 pain goes first

Week 2

Contracts + 341 workflow

Signature automation, auto-folders, daily reminders

Weeks 3–4

Intake + scheduling

Conditional intake form, round-robin booking, spreadsheet kill begins

Weeks 5–8

Money + reporting layer

Billing queues, reporting bridge, one texting inbox

Weeks 9–12

Sunset + recovery

Kill redundant software, run the pipeline recovery campaign

Phase 3

Case mgmt + AR billing

Deliberately last — after the team has adapted

Sequence rule: **no spreadsheet is retired until its replacement has an owner, required fields, reporting output, and staff acceptance.**

WEEK 1 · START HERE

Document Collection First

- **GetDocs live for BK cases** — Ch.7/Ch.13 checklists from your filing requirements, Spanish from day one
- **Auto-compression and conversion** on every upload — ends the 341 team's 2-hour manual file sessions
- **Automated reminders** — SMS + email until documents arrive; the daily hand-typed routine ends
- **Array credit integration** — \$73/case drops to \$8-\$10/case
- **Missing-document dashboard** — replaces three redundant tracking spreadsheets
- **341@robertgellerlaw.com** — court notices reach the department, not an attorney's inbox

Owner: Iron Noodle

Why first: every department named it pain #1

\$120K+/yr

credit report savings, starting day one

8 of 23

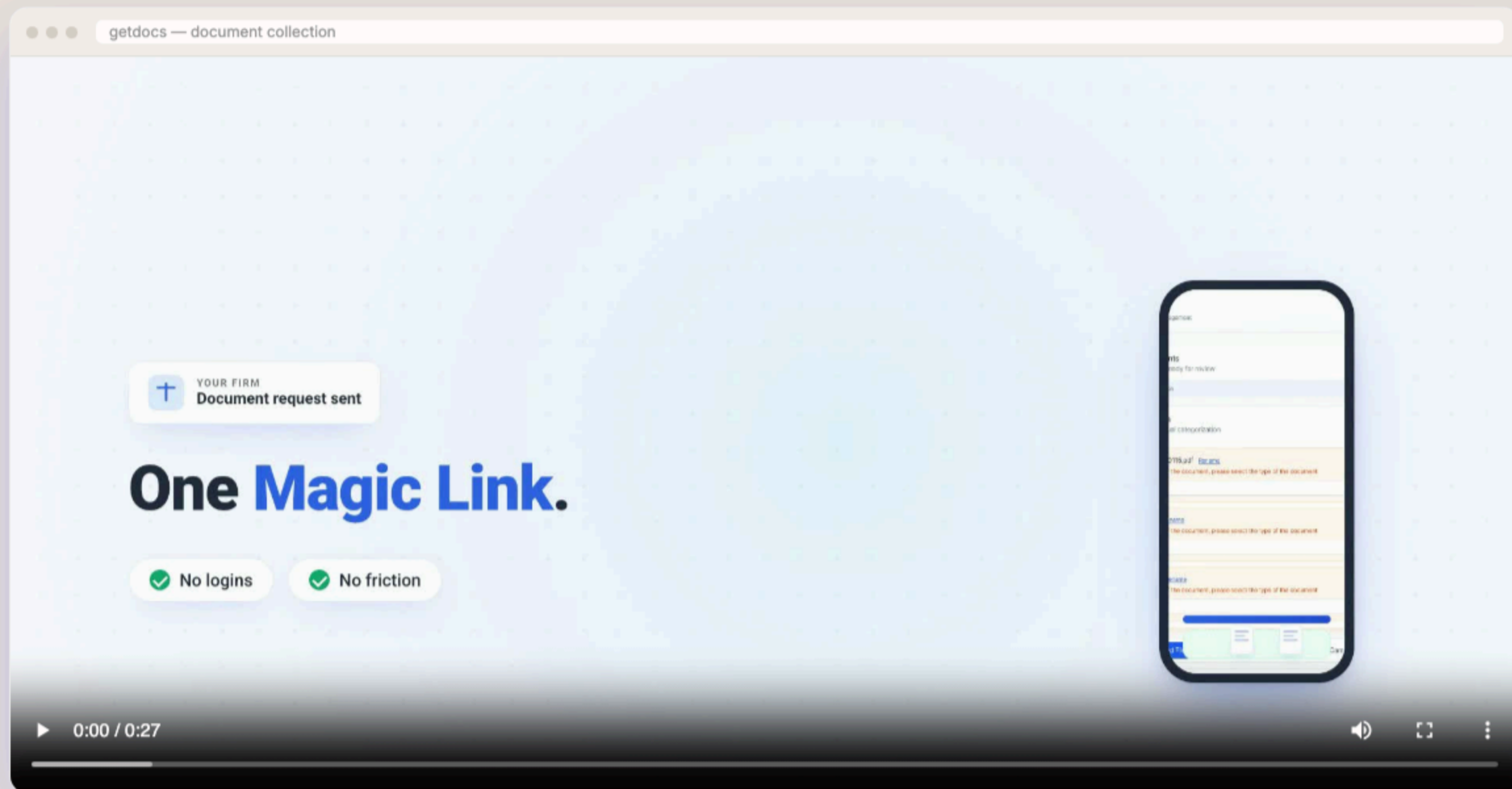
daily 341 tasks eliminated

3-4 FTE

paralegal capacity redeployed from document chasing

WEEK 1 · SEE IT WORKING

Watch Document Collection Work

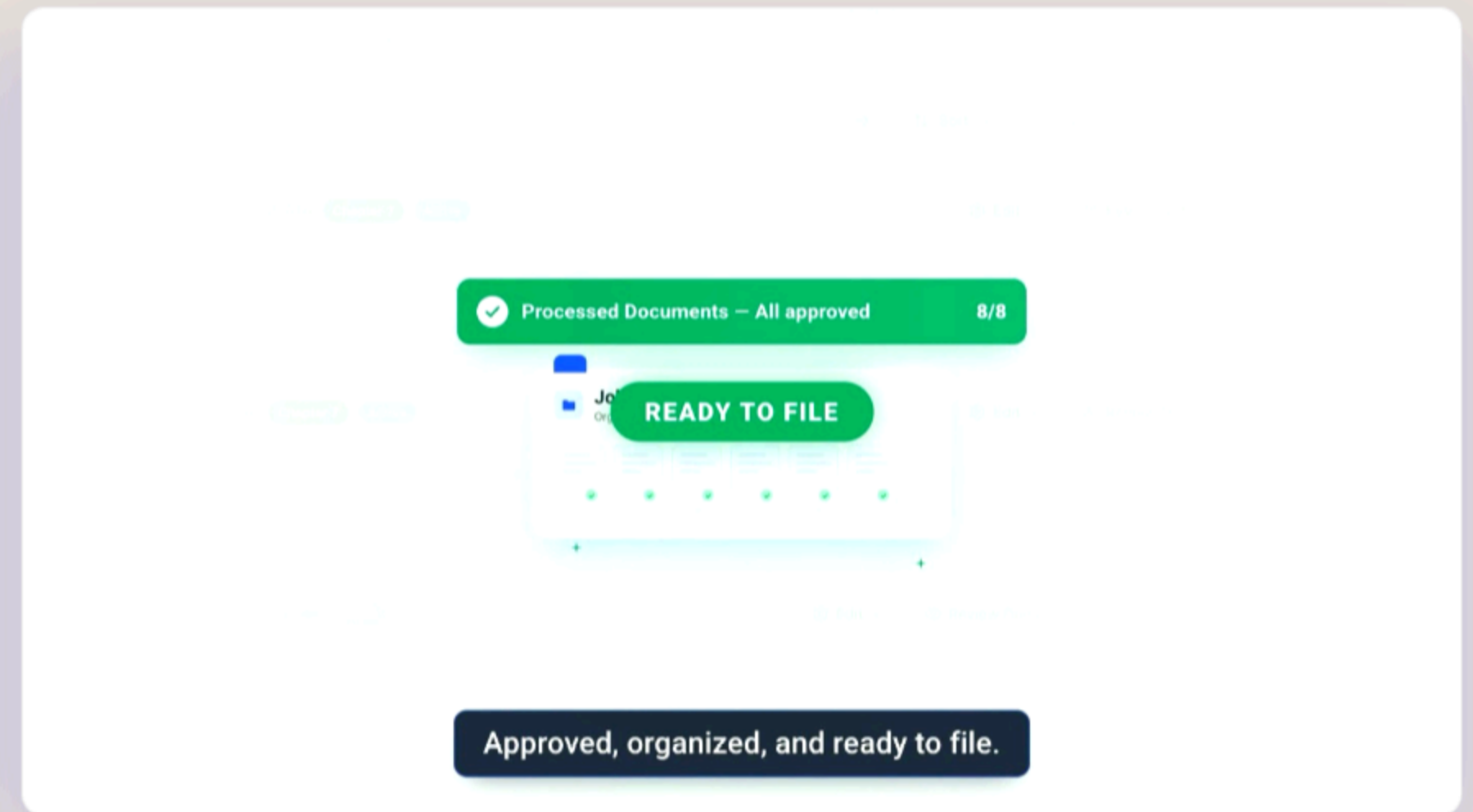


Twenty-seven seconds, request to ready-to-file — the same platform running document collection for high-volume bankruptcy firms today. Live for your cases in Week 1.

What Your Client Sees. What Your Team Sees.



The client: one link, no passwords, phone camera uploads — in English or Spanish. The reminder chase ends.



Your team: every file validated, classified, and staged — **ready to file** without the two-hour review session.

WEEK 2

Contract Automation + 341 Workflow

- **Zoho Sign replaces Dropbox Sign / HelloSign** — three BK contract templates populate from the CRM record in one click; already in your license, no new cost
- **Auto-folder creation on hire** — SharePoint folder + case profile created by workflow, not by hand
- **Automated daily 341 reminders** — every client with a hearing tomorrow gets a 9 AM message
- **Trustee checklists auto-generated** from case data — 200/month stop being hand-built
- **Intake data flows into GetDocs** — no copy-paste between systems

Owners: Dave + Iron Noodle

Dave: "high-priority easy win"

12–21 min

manual onboarding per client today → under 2 minutes

620–1,087 hrs/yr

copy-paste recovered across 3,109 annual hires

WEEKS 3-4

Intake, Scheduling & Spreadsheet Kill — Batch 1

- **Intake form rebuilt** — conditional logic by case type replaces the 2019 PDF; Ana approves the UX before rollout
- **Round-robin scheduling** — available-slot booking ends calendar cherry-picking
- **Four Eyes killed** (both versions) — phone team moves to native CRM tools
- **Valeria's 10 client-service spreadsheets migrate** — her trackers are the build spec; they become queues and dashboards
- **2nd-course tracking automated** — 4 daily tasks become 0
- **AI voice coverage, after-hours + overflow** — answer rate target 95%+ (now 79-80%)

Owners: Dave + Iron Noodle + outsourced template labor

~\$8K/yr

Four Eyes eliminated

10 sheets

client-service trackers replaced in the first batch

95%+

phone answer target — every missed call is a \$2,161 case

WEEKS 5-8

The Money & Reporting Layer

- **Helene's 7-tab billing doc retires** — payment exceptions become owned queues with LawPay sync
- **Retains, cancellations, bounces automated** — counted and assigned by the system, not by hand
- **Reporting bridge deployed** — one trusted layer pulling phones, CRM, and invoicing together; the data leadership can finally trust
- **Call intelligence** — every call scored for urgency; escalation language auto-flagged; no client sits 24-48 hours unseen
- **Texting consolidated** — one inbox, one thread per client; Fix Your Funnel and Connect retired

Owners: Dave + Iron Noodle

~\$11K/yr
texting software eliminated

Since 2016
Helene's weekly manual report compilation — ends here

WEEKS 9-12

Software Sunset & Pipeline Recovery

- **Keep + Graphly retired** once native dashboards are live (~\$16K/yr)
- **Conversion + marketing dashboards** — lead → set → show → hire by source, from live pipeline data
- **Assignment rules replace sticky notes** — Ana's single-point-of-failure lookup system becomes automated routing
- **Signing checklists become stage transitions** — each step enforced before the next
- **Pipeline recovery campaign** — AI voice calls the 1,146 unfiled clients, live-transfers on connect; runs only after the upstream systems work

Owners: Dave + Iron Noodle

\$248K

at just 10% pipeline recovery (115 filings)

\$495K

at 20% recovery

\$35-45K/yr

total subscriptions eliminated

Case Management & AR Billing — Deliberately Last

Why it waits

It touches attorney workflows, trust accounting, and court filing integrations — the most complex migration in the building.

What must be true first

The CRM layer is stable and the team has lived with the new intake, signature, and document stack for a full quarter.

The 80/20 rule

Phases 1–2 capture 80%+ of the operational savings. Phase 3 completes the architecture — it does not carry the ROI.

Sequencing agreed with Dave, May 18: **“those steps involve more complex processes.”** No big bang. One working system per week.

ACCOUNTABILITY

Who Owns What

LANE	OWNER	DELIVERS
Executive sponsor	Robert & Helene Geller	Priorities, vendor decisions, adoption enforcement
Blueprint lead	Iron Noodle	Sequencing, weekly accountability, blocker decisions
CRM build	David Minckiewicz — Detroit Software Solutions	Forms, workflows, dashboards, queues, migrations
Template labor	Outsourced (\$12/hr), Dave-managed	Form and template production at grunt-work cost
Department adoption	Geller dept leads	Workflow validation, field acceptance, staff rollout
Reporting layer	Iron Noodle + David	One leadership dashboard with source-of-truth rules

Monday
Build review — what shipped, what's blocked, what's next

Wednesday
Staff validation — department lead tests the new workflow

Friday
Executive scorecard — progress vs. goals, open decisions

MILESTONES

30 / 60 / 90 Day Goals

Day 0–30: Stop the friction

Document dashboard live · 341 notice routing live · contract flow started · first client-service trackers migrated.

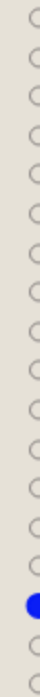
Day 31–60: Kill the risk

Billing exception queue live · retain/bounce tracking automated · filing reports live · first leadership dashboard active.

Day 61–90: Run on rules

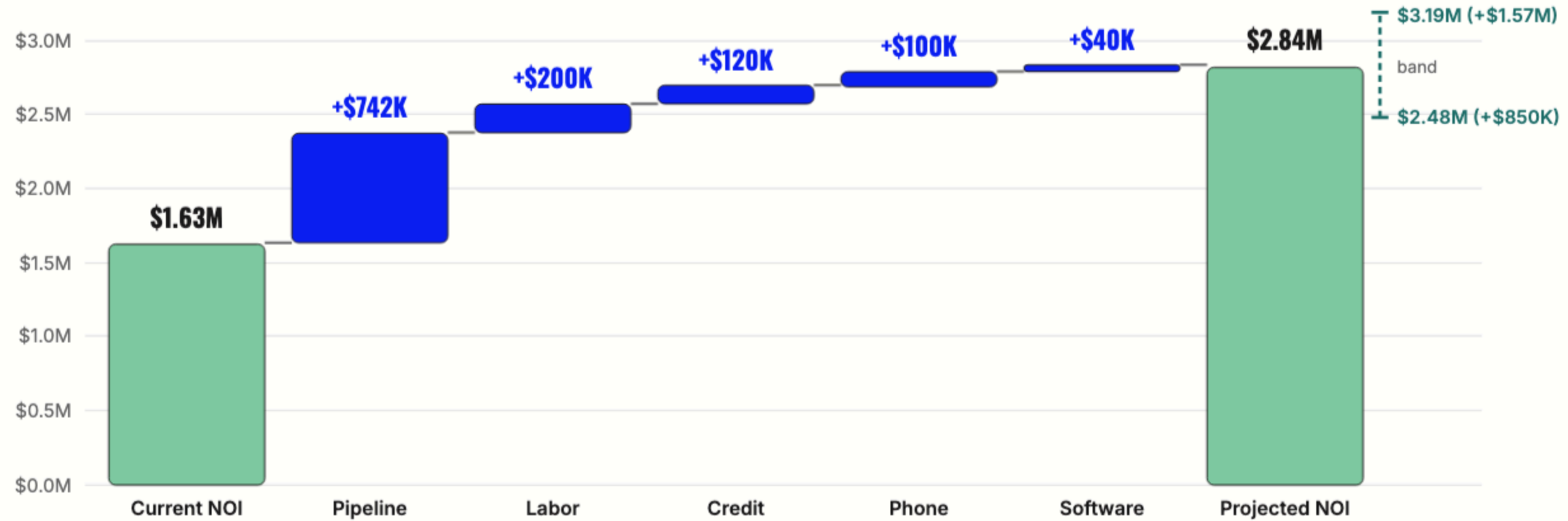
Conversion and marketing dashboards live · assignment rules live · pipeline recovery campaign launched.

The first 90 days are not a software project. **They are a control project.**



THE PAYOFF

How the Bottom Line Changes



Midpoints of the published ranges, shown for scale. The honest band is \$2.48M–\$3.19M projected NOI (\$850K conservative to \$1.57M aggressive recovery). Pipeline and labor are recovered revenue and capacity; credit, phone, and software are cost reductions. No outcome is guaranteed; every lane's math is sourced in the Blueprint. (The \$2.48M band floor is NOI — a different quantity from the \$2.48M pipeline figure; the match is rounding coincidence.)

One working system per week. Ninety days to operating control.

Plan is sequenced. Owners are assigned. Document collection is move one. **You pick Week 1. Roberto runs go-live with your team that same week. That's it.**

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