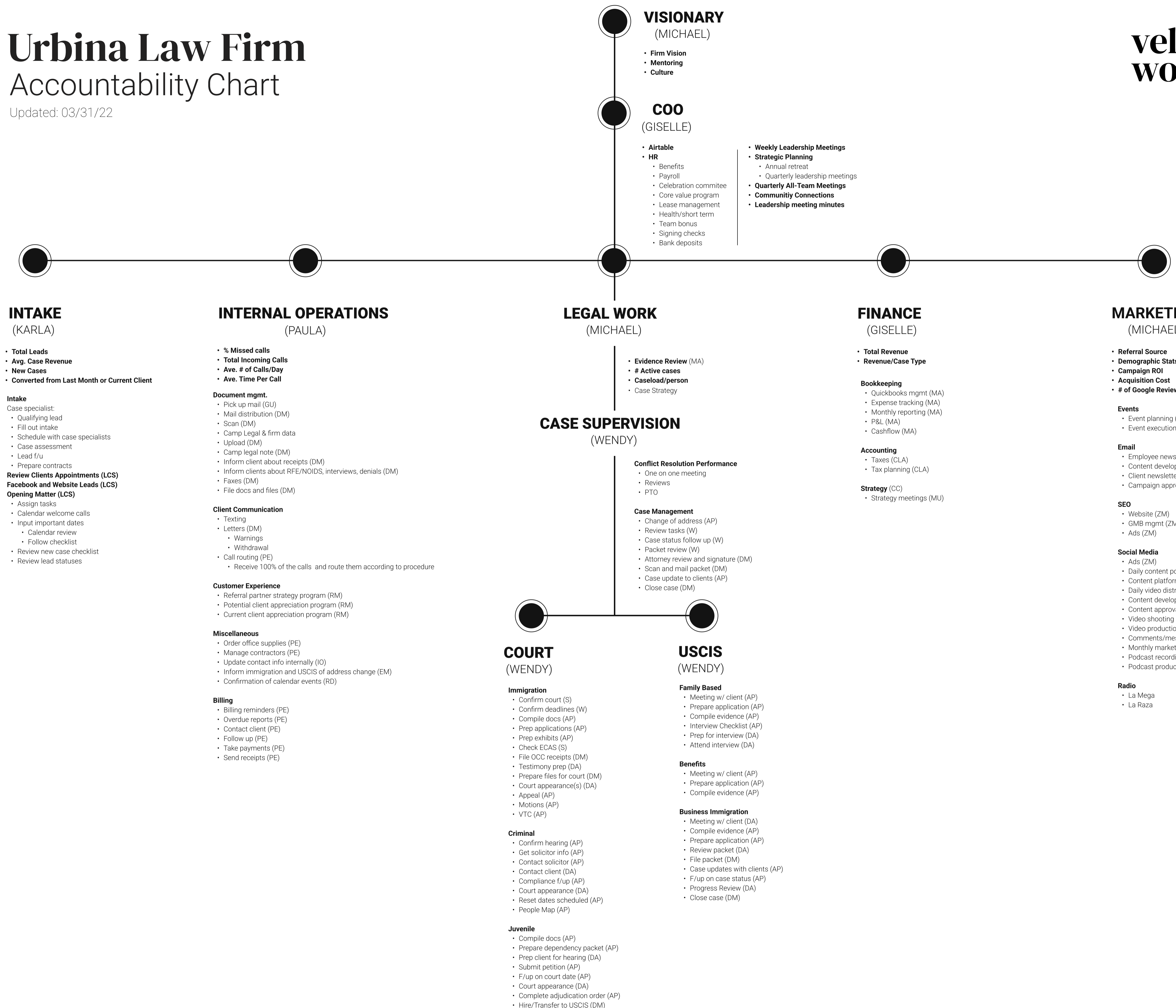


# Urbina Law Firm

## Accountability Chart

Updated: 03/31/22



### VISIONARY (MICHAEL)

- Firm Vision
- Mentoring
- Culture

### COO (GISELLE)

- **Airtable**
- **HR**
  - Benefits
  - Payroll
  - Celebration committee
  - Core value program
  - Lease management
  - Health/short term
  - Team bonus
  - Signing checks
  - Bank deposits
- **Weekly Leadership Meetings**
- **Strategic Planning**
  - Annual retreat
  - Quarterly leadership meetings
- **Quarterly All-Team Meetings**
- **Community Connections**
- **Leadership meeting minutes**

### INTAKE (KARLA)

- Total Leads
- Avg. Case Revenue
- New Cases
- Converted from Last Month or Current Client

#### Intake

- Case specialist:
- Qualifying lead
  - Fill out intake
  - Schedule with case specialists
  - Case assessment
  - Lead f/u
  - Prepare contracts

#### Review Clients Appointments (LCS)

#### Facebook and Website Leads (LCS)

#### Opening Matter (LCS)

- Assign tasks
- Calendar welcome calls
- Input important dates
  - Calendar review
  - Follow checklist
- Review new case checklist
- Review lead statuses

### INTERNAL OPERATIONS (PAULA)

- % Missed calls
- Total Incoming Calls
- Ave. # of Calls/Day
- Ave. Time Per Call

#### Document mgmt.

- Pick up mail (GU)
- Mail distribution (DM)
- Scan (DM)
- Camp Legal & firm data
- Upload (DM)
- Camp legal note (DM)
- Inform client about receipts (DM)
- Inform clients about RFE/NOIDS, interviews, denials (DM)
- Faxes (DM)
- File docs and files (DM)

#### Client Communication

- Texting
- Letters (DM)
  - Warnings
  - Withdrawal
- Call routing (PE)
  - Receive 100% of the calls and route them according to procedure

#### Customer Experience

- Referral partner strategy program (RM)
- Potential client appreciation program (RM)
- Current client appreciation program (RM)

#### Miscellaneous

- Order office supplies (PE)
- Manage contractors (PE)
- Update contact info internally (IO)
- Inform immigration and USCIS of address change (EM)
- Confirmation of calendar events (RD)

#### Billing

- Billing reminders (PE)
- Overdue reports (PE)
- Contact client (PE)
- Follow up (PE)
- Take payments (PE)
- Send receipts (PE)

### LEGAL WORK (MICHAEL)

- Evidence Review (MA)
- # Active cases
- Caseload/person
- Case Strategy

### CASE SUPERVISION (WENDY)

#### Conflict Resolution Performance

- One on one meeting
- Reviews
- PTO

#### Case Management

- Change of address (AP)
- Review tasks (W)
- Case status follow up (W)
- Packet review (W)
- Attorney review and signature (DM)
- Scan and mail packet (DM)
- Case update to clients (AP)
- Close case (DM)

### COURT (WENDY)

#### Immigration

- Confirm court (S)
- Confirm deadlines (W)
- Compile docs (AP)
- Prep applications (AP)
- Prep exhibits (AP)
- Check ECAS (S)
- File OCC receipts (DM)
- Testimony prep (DA)
- Prepare files for court (DM)
- Court appearance(s) (DA)
- Appeal (AP)
- Motions (AP)
- VTC (AP)

#### Criminal

- Confirm hearing (AP)
- Get solicitor info (AP)
- Contact solicitor (AP)
- Contact client (DA)
- Compliance f/up (AP)
- Court appearance (DA)
- Reset dates scheduled (AP)
- People Map (AP)

#### Juvenile

- Compile docs (AP)
- Prepare dependency packet (AP)
- Prep client for hearing (DA)
- Submit petition (AP)
- F/up on court date (AP)
- Court appearance (DA)
- Complete adjudication order (AP)
- Hire/Transfer to USCIS (DM)

### USCIS (WENDY)

#### Family Based

- Meeting w/ client (AP)
- Prepare application (AP)
- Compile evidence (AP)
- Interview Checklist (AP)
- Prep for interview (DA)
- Attend interview (DA)

#### Benefits

- Meeting w/ client (AP)
- Prepare application (AP)
- Compile evidence (AP)

#### Business Immigration

- Meeting w/ client (DA)
- Compile evidence (AP)
- Prepare application (AP)
- Review packet (DA)
- File packet (DM)
- Case updates with clients (AP)
- F/up on case status (AP)
- Progress Review (DA)
- Close case (DM)

### FINANCE (GISELLE)

- Total Revenue
- Revenue/Case Type

#### Bookkeeping

- Quickbooks mgmt (MA)
- Expense tracking (MA)
- Monthly reporting (MA)
- P&L (MA)
- Cashflow (MA)

#### Accounting

- Taxes (CLA)
- Tax planning (CLA)

#### Strategy (CC)

- Strategy meetings (MU)

### MARKETING (MICHAEL)

- Referral Source
- Demographic Stats
- Campaign ROI
- Acquisition Cost
- # of Google Reviews

#### Events

- Event planning (UP)
- Event execution (UP)

#### Email

- Employee newsletter (ZM)
- Content development (ZM)
- Client newsletter (ZM)
- Campaign approval (GU)

#### SEO

- Website (ZM)
- GMB mgmt (ZM)
- Ads (ZM)

#### Social Media

- Ads (ZM)
- Daily content post distribution (ZM)
- Content platform adaptation (ZM)
- Daily video distribution (MU)
- Content development (MU)
- Content approval (MU)
- Video shooting (MU)
- Video production (MU)
- Comments/messages mgmt. (ZM)
- Monthly marketing strategy (ZM)
- Podcast recording (MU)
- Podcast production (MU)

#### Radio

- La Mega
- La Raza