Christie Law Firm

Accountability Chart

Updated: 11/14/22

velocity work.

VISIONARY

INTEGRATION

- Business Administration **(NIC)**
- Email Management **(VA)**
- All things Business **(VA)**
- Determine any tasks needed for Nicole **(NIC)**
- Ensure that all business tasks are completed **(VA)**
- Ensures that Nicole's tasks are completed **(VA)**
- Schedules all Nicole's Appointments (need a VOIP) **(VA)**
- Ensures court procedures are Juvinile court and court division **(NIC)**
- Ensures processes are developed and followed **(NIC)**
- Conducts one to one meetings **(NIC)**

MARKETING

- Determine Marketing plan for the year **(NIC)**
- Document marketing plan for the year **(NIC)**
- Determine quartely marketing goals based on yearly marking goal **(NIC)**
- Execute marketing plan for the quarter **(OUT)**
- Determine the effectiveness of marketing plans **(NIC)**
- Create and update referral partner list **(NIC)**
- Contact referral partners **(NIC)**
- Schedule time with referral partners **(NIC)**
- Identify marketing opportunities in the community **(N/A)**
- Monitor and respond to contacts on social media **(N/A)**
- Develop social media compaigns and monitor **(OUT)**
- Maintain SEO and content creation on website **(OUT)**
- Track effectivenss of each marketing effort **(NIC)**

SALES/INTAKE

- Accept all calls coming into the office **(CE)**
- Identify new leads and send to intake team **(CE)**
- Identify leads ready to hire **(CE)**
- Send onboarding information to lead **(CE)**
- Talk with lead to covert to hiring **(ATT)**
- Send non-hiring lead information about the firm **(CE)**
- Complete onboarding of new client **(CE)**
- Report on lead activitiy weekly to business team **(CE)**
- Check for any online leads coming into the office **(CE)**
- Inform assigned legal assistant and intergrator of new client **(CE)**
- Report on new clients hired weekly to intergrator **(CE)**

OPERATIONS

FINANCE

- Complete monthly bookeeping for all accounts **(OUT)**
- Pay bills for the firm **(NIC)**
- Complete client billing for the firm **(NIC)**
- Pay the firm from IOLTA **(NIC)**

COURT SERVICES

E-SERVICES

- **Family**
  - Check family court notices **(PL)**
  - Check for orders **(PL)**
  - Check new court dates **(PL)**
  - Check new activity **(PL)**
  - Upload Court Orders **(PL)**
  - Upload missing docs **(PL)**
  - Calendar new court dates **(PL)**
  - Notify Client **(PL)**
- **Juvenille**
  - Check new court dates **(PL)**
  - Check new court activity **(PL)**
  - Upload missing docs **(PL)**
  - Calendar new court dates **(PL)**
  - Notify client **(PL)**

TURBOCOURT

- Check for new Court Dates **(PL)**
- Check for new filings **(PL)**
- Notify Client of new court dates **(PL)**
- Upload missing docs **(PL)**
- Upload Court Orders **(PL)**

ONGOING COURT CALENDAR CONFLICT CHECK

- Monitor Court Calendar for Conflicts **(PL)**
- File Continuance Requests **(PL)**

DCF

PROBATE CUSTODY

Onboarding

- Determine type of case **(AA)**
- Apply necessary workflows **(PL)**
- Obtain DCF releases of information **(PL)**
- Check for intake completion **(PL)**
- Schedule first appointment with attorney **(PL)**
- Meet with client **(AA)**

Probate Custody

- File appearance **(PL)**
- Determine next court date **(PL)**
- Check with court services officer for conflicts **(PL)**
- Request continuance as needed **(PL)**
- Upload court file to system **(PL)**
- Determine procedural history **(PL)**
- Determine procedural posture **(AA)**
- Determine necessary petitions **(AA)**
- File petitions **(PL)**
- Complete workflows as assisgned **(PL)**
- Determine case plan **(AA)**
- Document case plan **(AA)**
- Share case plan with client **(PL)**
- Prepare client for probate custody process **(AA)**
- Execute steps assigned to the firm **(PL)**
- Determine client's providers **(PL)**
- Determine providers to contact **(AA)**
- Execute necessary company releases **(PL)**
- Determine information needed from providers **(AA)**
- Contact providers necessary provider **(PL)**

Trial Preparation

- Complete exhibits list **(AA)**
- Gather exhibits **(AA)**
- Prep witnesses **(AA)**
- Review tactical plan with client **(AA)**
- Determine motions to be filed **(AA)**
- File motions **(PL)**
- Comply with standing court orders
  - Draft proposed orders **(AA)**
  - Share proposed order with opposing parties **(PL)**
- Interview witnesses **(AA)**
- Issue subpoenas **(PL)**
- Determine if expert is needed **(AA)**
- Locate expert **(AA)**
- Arrange to pay expert **(AA)**

Ongoing Case Assessment for Closure

- Monthly updates with clients **(PL)**
  - Get current status update for from client (monthly) **(PL)**
  - Determine next steps **(AA)**
  - Execute next steps **(PL)**
- Determine if motions are needed to achieve case goals **(AA)**
- Asses needs for closing case **(AA)**
- Execute needs to close **(PL)**
- Close case **(PL)**

FAMILY

Onboarding

- Apply and complete necessary work flows **(PL)**
- Send client completes questionairre **(AA)**
- Ensure client questionairre completed **(AA)**
- Research procedural history **(AA)**
- Determine current procedural posture **(AA)**
- Obtain necessary documents **(PL)**
- Review financial disclosures **(AA)**
- Schedule client interview **(PL)**
- Interview client regarding their questionairre **(AA)**
- Determine client's goals **(AA)**
- Determine case objectives **(AA)**
- Complete necessary legal research **(AA)**
- Obtain necessary evidence from client **(AA)**
- Prepare for upcoming court date **(AA)**
- Prepare client for court **(AA)**
- Determine if an agreement can be reached **(AA)**
- If no agreement, see trial preparation **(AA)**

Trial Preparation

- Complete exhibits list **(AA)**
- Gather exhibits **(AA).**
- Prep witnesses **(AA)**
- Determine motions to be filed **(AA)**
- Comply with standing court orders **(PL)**
  - Draft proposed orders **(AA)**
  - Share proposed order with opposing parties **(PL)**
- File motions **(PL)**
- Interview witnesses **(AA)**
- Issue subpoenas **(PL)**
- Determine if expert is needed **(AA)**
- Locate expert **(AA)**
- Arrange to pay expert **(AA)**
- Ensure the completion of the financial affidavit **(PL)**
- Review financial affidavit **(AA)**
- File financial affidavit **(PL)**

Ongoing Case Assessment for Closure

- Monthly updates with clients
  - Get current status update for from client (monthly) **(PL)**
  - Determine next steps **(AA)**
  - Execute next steps **(PL)**
- Check in with opposing party/counsel **(AA)**
- Asses needs for closing case **(AA)**
- Execute needs to close **(PL)**
- Close case **(PL)**

MOTIONS TO INTERVENE

Onboarding

- Determine type of case **(AA)**
- Apply and complete workflows **(PL)**
- Obtain DCF releases of information **(PL)**
- Check for intake completion **(PL)**
- Schedule first appointment with attorney **(PL)**
- Meet with client **(AA)**

Court Case

- File appearance **(PL)**
- Determine of basis to intervene **(AA)**
- File motion to intervene **(PL)**
- Determine next court date **(PL)**
- Check with court services officer for conflicts **(PL)**
- Request continuance as needed **(PL)**
- Determine procedural history **(PL)**
- Determine procedural posture **(AA)**
- Prepare client for court hearing **(AA)**

Ongoing Case Assessment for Closure

- Monthly updates with clients **(PL)**
- Get current status update for from client (monthly) **(PL)**
- Determine next steps **(PL)**
- Execute next steps **(AA)**
- Determine if motions are needed to achieve case goals **(AA)**
- Needs for closing case **(AA)**
- Execute needs to close **(AA)**
- Close case **(PL)**
- Court time Required **(AA)**

REUNIFICATION

Onboarding

- Determine type of case **(AA)**
- Apply and complete necessary workflows **(PL)**
- Obtain DCF releases of information **(PL)**
- Check for intake completion **(PL)**
- Schedule first appointment with attorney **(PL)**
- Meet with client **(AA)**

DCF + Court Case

- File appearance **(PL)**
- Determine next court date **(PL)**
- Check with court services officer for conflicts **(PL)**
- Request continuance as needed **(PL)**
- Upload court file to system **(PL)**
- Determine procedural history **(AA)**
- Determine procedural posture **(AA)**
- Review spec ific steps with client **(AA)**
- Complete Pleading Process
  - Complete nolo **(PL)**
  - Obtain singed nolo **(PL)**
  - Obtain signed specific steps **(PL)**
  - File nolo and specific steps**(PL)**
  - Complete plea canvas with client **(AA)**
- Complete workflows as assisgned **(AA/PL)**
- Determine case plan **(AA)**
- Document case plan **(AA)**
- Share case plan with client **(PL)**
- Execute steps assigned to the firm **(AA/PL)**
- Determine client's providers **(PL)**
- Determine if there are providers to contact **(AA)**
- Execute necessary company releases **(PL)**
- Contact providers if necessary **(PL)**

Trial Preparation

- Request entire DCF file **(PL)**
- Ensure we have entire file **(PL)**
- Determine if law clerk is needed **(AA)**
  - If yes, complete law clerk request **(AA)**
- Complete exhibits list **(AA)**
- Gather exhibits **(AA/PL)**
- Prep witnesses **(AA)**
- Review tactical plan with client **(AA)**
- Determine motions to be filed **(AA)**
- File motions **(PL)**
- Comply with standing court orders **(AA)**
- Interview witnesses **(AA)**
- Determne if subpoena is necessary **(AA)**
- Issue subpoenas **(PL)**
- Determine if expert is needed **(AA)**
- Locate expert **(AA)**
- Arrange to pay expert **(AA)**

Ongoing Case Assessment for Closure

- Monthly updates with clients **(PL)**
- Get current status update for from client (monthly) **(PL)**
- Document update in file and alert attorney **(PL)**
- Determine next steps **(AA)**
- Execute next steps **(AA/PL)**
- Determine if motions are needed to achieve case goals **(AA)**
- Needs for closing case **(PL)**
- Execute needs to close **(PL)**
- Close case **(PL)**
- Court time Required **(AA)**

SUBSTANTIATION HEARING

Onboarding

- Determine type of case **(AA)**
- Apply and complete necessary workflows **(PL)**
- Obtain DCF releases of information **(PL)**
- Check for intake completion **(PL)**
- Schedule first appointment with attorney **(INTAKE)**
- Meet with client **(AA)**
- Obtain any client docs **(PL)**
- Determine if hearing has been requested **(PL)**
- Determine hearing date **(PL)**
- Check with court services officer for conflicts **(PL)**
- Request continuance as needed **(PL)**

Substantiation Hearing Prep

- Request entire DCF file **(PL)**
- Ensure we have entire file **(PL)**
- Determine necessity of law clerk **(AA)**
  - Complete law clerk request **(AA)**
- Complete exhibits list **(AA)**
- Gather exhibits **(AA)**
- Advise client of pros and cons of testifying **(AA)**
  - Prep client to testify **(AA)**
- Review tactical plan with client **(AA)**
- Interview witnesses **(AA)**
- Determine motions to be filed **(AA)**
- File motions **(PL)**
- Issue subpoenas **(PL)**
- Prep witnesses **(AA)**
- Determine if expert is needed **(AA)**
- Locate expert **(AA)**
- Arrange to pay expert **(AA)**

Complete Closing Process (PL)

- Court Hours **(AA)**

INVESTIGATIONS

Onboarding

- Determine type of case **(AA)**
- Apply and complete necessary workflows **(PL)**
- Obtain DCF releases of information **(PL)**
- Check for intake completion **(PL)**
- Schedule first appointment with attorney **(INTAKE)**
- Meet with client **(AA)**
- Contact social worker **(AA)**
- Determine if FAR or investigation **(AA)**
- Determine next home visit **(PL)**
- Prepare client for home visit **(AA)**

Ongoing Case Assessment for Closure

- Bi-weekly check with social worker **(PL)**
- Determine next steps **(AA)**
- Execute next steps **(PL)**
- Consult with client as to progress with case **(AA)**
- Determine needs for closing the case **(AA)**
- Execute needs to close **(PL)**
- Close case **(PL)**
- DCF Meeting Time **(AA)**