Jeff Lewis Law Accountability Chart

Updated: 01/23





- **Record** (Jason)
- Designation (Jason)
- Prepare Appendix (Jason)
- Purchased or Borrowed (Jason)
- Verified, Augment or Complete (Jason)
- Briefing (Jeff)
- Outline issues (Jeff)
- Draft brief (Sean)
- Hyperlinked and Polished (Jason) Argument (Sean)
- Refreshing Research (Sean)
- Post-Opinion (Sean)
- Assist with Free motion (Sean)
- Counsel clients on appeals (Jeff)
- Close File (Jason)
- Ask for Testimonial (Renee)
- Writs
- Calendaring deadlines (Renee)
- Documents from Trial Counsel (Renee)
- Briefing (Jeff)
- Outline Issues (Jeff)
- Draft Brief (Sean)
- Research Issues (Sean)
- Hyperlinked and Polished (Jason)
- Return of Writ (Jason)
- Counsel client on appeals (Sean) Close file (Jason)
- Ask for Testimonial (Renee)

LITIGATION JEFF

- Pleadings (Jeff)
- Outline Issues/Claims (Jeff)
- Draft pleading (Renee or Sean)
- Filed (Renee)
- **Discovery** (Sean)
- Discovery plan (Jeff)
- Airtable (Renee)
- Opening round (Renee + Sean) • Respond to discovery (Renee + Sean)
- Take and Defend Depos (Sean)
- Expert Selection (Jeff)
- Expert Designation (Renee)
- Expert Depositions (Renee)
- Supplemental Discovery (Renee)
- Document Organization (Renee) • ADR (Sean)
- Trial prep (Jeff)
- Witness list (Renee)
- Exhibit lists (Renee)
- Trial briefs (Sean)
- MILs (Sean)
- Tech issues (Jason)
- Jury instructions (Jeff) • Opening statement (Jeff)
- Post-trial (Jeff) Post-trial motions (Jeff)
- Cost and fee motions (Sean)
- Enforcement (Sean)
- Perfecting appeal (Jason)
- Close file (Jason)
- Ask for Testimonial (Renee)

STRATEGIST JEFF

• Client selection (Jeff)

- Case strategy (Jeff)
- Culture (Jeff)
- Growth and development of firm (Jeff)
- Measurements/tracking (Jason) Setting goals (Jeff)
- On-the-business development (Jeff)
- Mentoring/teaching (Jeff)

ADMINISTRATION JASON

• Billing (Jason)

- Running Bills (Jason)
- Collections (Jason)
- Bank Deposits (Jason)
- Client Communications ((Jason/Renee)
- Expense Entries (Jason) • HR (Jeff)
- Days off and hours tracking (Jason)
- Payroll (Jason)
- Compensation (Jeff)
- Hiring/Termination (Jeff)
- Performance Reviews (Jeff)
- Celebrations (Renee/Jeff)
- Accounts payable (Jason)
- Mail Processing (Jason/Renee)
- Malpractice Insurance (Jeff)
- CorporateCompliance and Licensing (Jason)

OPERATIONS

JASON

Attorney Hours Firm Revenue **Tracking Metrics**

· Intake

- Retainer Agreement (Jason) • Conflict Waiver (Jason)
- Payment Link (Jason)
- Slack/Clio/Onedrive (Jason)

Case Management

- Calendaring deadlines (Renee) • Document from Trial Counsel (Renee)
- MARKETING JEFF
- Incoming Calls (SmithAI & Kim) • Personal Marketing (Jeff)
- Provisors, Chambers, Inns
- Tracking Referral Partners
- Electronic Marketing CALP (Jeff)
- SendOut Cards (Jeff/VA)
- Lunches (Jeff)
- SuperLawyers (Jason)
- Facebook (Jason)
- EFF (Sean)
- Social Media
- Content Creation (VA)
- Proofing/Approval (Jason)
- Posting (VA)



Anti-SLAPP motion (Sean)

- Issue Spotting (Jeff)
- Reserve Hearing (Renee)
- Draft client declaration (Sean)
- Draft motion (Sean)
- Draft request for judicial notice (Jason)
- Draft objections (Jason)
- Draft reply (Sean)
- Draft proposed order (Sean)
- Draft fee motion (Sean)
- Enforcement (Sean)
- Perfecting Appeal (Jason)
- Close file (Jason) Ask for Testimonial (Renee)

- Client Meetings (Jeff)

LAND USE JEFF

- PowerPoint or Letter to Agency (Jeff)
- PRAs (Jason)
- Appear at Hearing (Jeff)
- Post Hearing Advice (Jeff)
- Close File (Jason) Ask for Testimonial (Renee)

