Kendall Law
Accountability Chart
Updated: 10/13/22

velocity work.

VISIONARY
- Thinking time for the business
- Culture

OPERATIONS
- Provide Monthly Reports to Visionary
  - Referral fees to be paid **(PP)**
  - Past due receivables **(PP)**
  - Top referral sources **(KS)**
  - Trust Replenishment Report **(PP)**
- Lead Monday and Friday Team meeting **(MIG)**
- Bi-yearly reviews **(EMK)**
- Hiring/Firing **(EMK)**
- Vacation approval **(EMK)**
- Weekly Leadership Meeting **(MIG)**
- Signing Checkes **(MIG)**

- Input data into Airtable **(EMK)**
  - Closed Case Info **(KS)**
  - UD Property Management **(KS)**
  - Marketing **(KS)**
  - Firm Financial **(Lorena)**
  - Producer Info **(EMK)**

ADMIN
- Answering phone calls **(PP)**
- Watering plants **(KS)**
- Changing water in cooler **(KS)**
- Taking out trash **(KS)**
- Yearly review of ins policies **(KS)**
- Updating employment posters **(KS)**
- Filing away judgements **(KS)**
- Year end clean up **(KS)**
- Filing paper receipts and invoices **(KS)**
- Taking inventory of supplies **(KS)**
- Ordering supplies **(KS)**
- Stocking bathroom supplies **(KS)**
- Organzing and throwing celebrations **(KS)**
- Filling printer paper trays **(KS)**
- Closing files **(KS)**
- Monitoring and upkeep of passwords **(KS)**

INTAKE
- Schedule consultations **(MH)**
- Intake followup **(MH)**
- Consultation reminder calls **(MH)**
- Consultation f/u calls **(MH)**
- Preparing engagement letters **(MH)**
- f/u on signing letters **(MH)**
- f/u on consultation payment **(MH)**
- f/u on retainer payment **(MH)**

CLIENT SERVICES
- Fact gathering/litigation memo **(RA)**
- Client updates **(RA)**
- Processing mail **(KS)**
- Coordinate calendaring and appearances for attorneys **(KS)**
- Editing and proofing documents **(RP)**
- Finalizing documents **(RP)**
- Signing documents **(RA)**
- Calls to the court for status updates **(RP)**
- Calls to the sheriff for status updates **(RP)**
- Sending documents to clients **(RP)**

MARKETING
- Social media content **(EMK)**
- Social media posts **(VA)**
- Website content **(EMK)**
- Website management **(Localista)**
- Arranging speaking engagements **(KS)**
- Monthly thank you to referral partners **(KS)**
- Holiday gifts for referral partners **(KS)**

FINANCE
- Entering AP **(PP)**
- Paying AP **(PP)**
- Payroll **(Lorena)**
- 401K contribution entry **(Lorena)**
- Reconciling accounts **(Lorena)**
- Yearly tax preparation **(Lorena)**
- Generate monthly P&L **(Lorena)**
- Collections **(PP)**
- A/R **(PP)**
- Trust replenishment request **(PP)**

CASE MANAGER
- New client data entry **(MIG)**
- Ensuring docs are received **(MIG)**
- Initial client contact **(MIG)**
- 15-day check-ins **(MIG)**
- Exit interviews **(MIG)**

- Monthly case status meetings **(MIG)**
- Weekly case good/bad report meeting **(MIG)**

REAL ESTATE

CIVIL DISPUTES
- Consultations **(EMK)**
- Case strategy **(RA)**
- Formulating dicovery plan **(RA)**
- Executing dicovery plan **(RA)**
- Reviewing motions **(RA)**
- Write opposition **(RA)**
- Confirm motion dates **(KS)**
- Entering deadlines **(KS)**
- Court appearances **(RA)**
- **Jury Trial Prep (RA)**
  - Prepare witness list **(RA)**
  - Prepare jury instructions **(RA)**
  - Prepare exhibit list **(RA)**
  - Prepare statement of case **(RA)**
  - Prepare exhibit notebook **(RP)**
  - Meet and confer **(RA)**
  - File jury documents **(RP)**

BUSINESS
- Consultations **(EMK)**
- Gather information **(MH)**
- Prepare operating agreement **(RB)**
- Prepare SOS forms **(RB)**
- Obtain EIN **(RB)**
- File LLC documents with SOS **(RB)**
- Update client **(RB)**

UNLAWFUL DETAINER
- Consultations **(EMK)**
- Case strategy **(RA)**
- Obtain responsive pleading **(RP)**
- Send client recommendation + cost **(RA)**
- Prepare motions, including MSJ **(RA)**
- Formulating dicovery plan **(RA)**
- Executing dicovery plan **(RA)**
- Opposing Motions **(RA)**
- Write opposition **(RA)**
- Confirm motion dates **(KS)**
- Entering deadlines **(KS)**
- Default package preparation **(RP)**

- Write package preparation **(RP)**
- Sheriff package preparation **(RP)**
- Court appearances **(RA)**
- **Jury Trial Prep (RA)**
  - Prepare witness list **(RA)**
  - Prepare jury instructions **(RA)**
  - Prepare exhibit list **(RA)**
  - Prepare statement of case **(RA)**
  - Prepare exhibit notebook **(RP)**
  - Meet and confer **(RA)**
  - File jury documents **(RP)**

OTHER
- Consultations **(EMK)**
- Lease drafting **(RB)**
- Lease review **(RB)**
- Contract drafting **(RB)**
- Contract review **(RB)**
- Deed drafting **(RB)**
- PCOR drafting **(RB)**
- Submit deed package to recorder **(RP)**