# Springs Law Group
## Accountability Chart

Updated: December 2022

**velocity work.**

**MANAGING PARTNER**
JAKE

- Setting Performance Standards
- Advisement of managing Attorneys
- Reduce Inefficiencies
- Barrier Removal
- Vision/Goal setting
- Culture
- Big ideas
- Sign checks from OpEx acct
- Staff Termination/Hiring
- Spends/write-offs over $10K

**VISIONARY**
CHRIS

- Hiring/Firing/Reviews
- Performance reviews 90/Annual

**PRE-LIT**
DAVID

- Cases closed/revenue
- Bi-weekly case status/strategy meeting
- Case strategy
- Case speed
- Settlement amount

**LITIGATION**
JAKE

- Cases closed/revenue
- Weekly case status/strategy meeting
- Case strategy
- Case speed
- Settlement amount

**CASE MANAGEMENT**
AMANDA

- Demands sent
- Closed Cases
- Review demands
- PI Expense Checks
- Update Airtable
- Verify Costs
- Close out cases
- Pod Status Meetings
- Case Review
- Assign intake to atty/pod

**CASE MANAGEMENT**
AMANDA

- Demands sent
- Closed Cases
- PI Expense Checks
- Update Airtable
- Verify Costs
- Closes out cases
- Pod Status
- Meetings
- Case Review
- Assign to pod from Pre-lit

**POD A**
DAVID

- Case management (David)
- Client satisfaction (David)
- Review drafts (David)
- Negotiations (David)
- Case strategy (David)
- Onboarding (Ashley)
- 2-week checks (TBD)
- Monitor activity feed (Holly)
- Case updates to insurers (Holly)
- Verify SOL dates (Holly)
- Scanning (TBD)
- Records requests (Holly)
- Demand prep (Holly)
- Liens (Crystal)
- Settlement releases (Holly)

**POD B**
DAVID

- Case management (David)
- Client satisfaction (David)
- Review drafts (David)
- Negotiations (David)
- Case strategy (David)
- Onboarding (Ashley)
- 2-week checks (TBD)
- Monitor activity feed (Jenny)
- Case updated to insurers (Jenny)
- Verify SOL dates (Jenny)
- Scanning (TBD)
- Records requests (Jenny)
- Demand prep (Jenny)
- Liens (Crystal)
- Settlement releases (Jenny)

**POD C**
KEITH

- Case management (Keith)
- Client satisfaction (Keith)
- Review drafts (Keith)
- Negotiations (Keith)
- Case strategy (Keith)
- Onboarding (Ashley)
- 2-week checks (TBD)
- Monitor activity feed (Jenny)
- Case updated to insurers (Jenny)
- Verify SOL dates (Jenny)
- Scanning (TBD)
- Records requests (Jenny)
- Demand prep (Jenny)
- Liens (Crystal)
- Settlement releases (Jenny)

**POD 1**
KEITH

**Litigation Paralegal (Marta)**
- Pleadings drafting (Marta)
- Calendar deadlines (Tori)
- Scheduling (Marta)
- Discovery drafting (Tori)
- Disclosure drafting (Marta)
- Trial prep (Marta)
- Prepare exhibit notebooks (Marta)
- Liens (Crystal)
- Settlement releases (Marta)

**Senior Litigation Attorney (Keith)**
- Review paralegal drafts (Keith)
- Mediation prep/attendance (Keith)
- Deposition prep/attendance (Keith)
- Experts (Keith)
- Trial prep (Keith)
- Trial (Keith)
- Case strategy (Keith)
- Negotiations (Keith)

**Junior Litigation Attorney**

**FINANCE**
FRACTIONAL CFO?

- PNL review/strategy (Chris)
- Pay bills (Chris)
- Communication w/ accountant (Chris)
- Communication w/ Bookkeeper (Rachael)
- Savings (Chris)
- Allocating revenue (Chris)
- ENT PI exp: (Chris)
- Scanning bank deposit receipts (Rachael)
- Disbursement (Rachael)
- COLTAF (Rachael)

**MARKETING**
CHRIS

- Google reviews (Chris)
- Referrals tracking (Chris)
- Google Review Report (Lexis)
- Referral Report (Jake)
- Referral Gifting Calendar (Lexis)
- Community Marketing Calendar (Lexis)
- Paid Social Reporting (Paid PPC - Google)
- Advertising - Media, News (Chris)
- Website (Chris)
- Community marketing (Lexis)
- Referral gifting (Lexis)
- Social media (Chris)
- Video (Chris)
- Birthday Calls (Tori)
- Client gifting at open/close (Lexis)

**Intake Dept**
- Lead conversion (Chris)
- Initial Intake (TBD)
- Attorney Intake (David/Julia/Steven)
- Pipedrive follow-up/clean out (TBD)

**OPS**
CHRIS

- Monthly check-ins (Amanda)
  - Filevine notes - Pull Reports (Rachael)
  - 30-day improvement plan (PIP) - Pull Reports (Rachael)
  - Attendance - Pull Reports (Rachael)
- Payroll (Rachael)
- Team celebration (Chris)
- New hire training (Designated Mgr)
- Velocity work liaison (Jake)
- Cards (Tori)
- Cleaning (Tori)
- Answer phone (Tori/Ashley)
- Stock conference room (Tori)
- Supplies – ordering (Rachael)
- Incoming mail/fax (Tori)
- Mail demands (Rachael)
- CSPD Photo Requests (Rachael)

**CASE ACCOUNTING (RACHAEL)**