# **Taghavi Immigration Law**

## **Accountability Chart**

**Updated** 9/8/23



- Firm Vision
- Mentoring
- Culture
- Strategic Planning
   Annual retreat
   Quarterly Leadership Meetings
   Quarterly All-Team Meetings
- · AILA Congressional Liaison

# of overdue invoices (3, 7 & 30

Total Revenue per month - weekly

Average Revenue per USCIS Case

· Total Revenue per month

Total Expense (Overhead)

Total Operating Expenses

· Employment Verification

· Employee/Intern Letter of

· Employment status (raise,

bonus, FT/PT, hrs, hire) (ST)

· Weather/Office Closure/

· Leave Request (Medical,

· Late (#Team + #calendar or

· Reimbursement/Add

· Update Personal Info

· General HR questions/

· HR Approval - Follow Steps (TIL

· Leave Assm Mtg; Reassign

· 000 Msg - Gmail, Calendar,

Recap Email to Team before

Emergency (NS/ST)

Total Expense (People)

• Formal HR Requests: (ST)

Recommendation

Informal HR Requests (NS)

call EE/NS)

WFH

Team)

Calendly

Hours

Sick, PTO/TO)

· HR Service Request

· Submit through Monday

Average Revenue per EOIR Case

days) - weekly

Type (Goal: \$5,500)





### **SALES TEAM**

**MARCELO** 

- Total Leads per week (From Smith Ai)
- Conversion rates (QL Consult)
- Conversion rate (Consult Client) (Goal 40%)
- Number of new open cases per week (Goal 10)

### Facebook, Website, and Super Lawyers Leads (MS)

- Intake + Screening + QL (MS)
  - Confirming client information + docs
- Screening report card
- · Target cases
- QL + Consult to Client Follow-Ups (MS)
- Case Matter Set Up (MS)
- Calendar Management (MS)
- Rescheduling Conflict
- Check ECAS + MCH/IH Calendar
- Client MCH/IH Attendance via Gmail Invite
- Billing, Invoices & Contracts (MS/ST)
- · Refunds (ST/MS/NS Checks)

#### Track (MS):

- · Referral Source
- Number of QL
- · No. of refunds/unsatisfied clients
- No of unpaid balances/Withdrawals due to \$
- · Discounts & Pro Bono per mo

### **INTERNAL OPERATIONS**

**MARCELO** 

- Closed Cases per month
- Total EC calls per month (Goal is 150)
- Answer Meeting (NS)
- Scorecard Meeting (ST)
- Monday.com + Systems Management (MS)
- Mail Processing (MA)
- Mail E-Sorting (MA)
- Document Management (MA)
  - Mail pick-up/Scan/Processing (save to efile)
  - · File away/Shred Notices
- Fax Receipt + Distribution
- Document Collection Process (Pipefile Upload)
- Create Physical Files
- Customer Experience\* (MA)
  - · Referral partner strategy program
  - Potential Client appreciation program
  - Current client appreciation program
  - · Closed client appreciation program
- Receptionist Quality Assurance & Daily Call Summary (NS)
- Miscellaneous (MA)
- Office Supplies Request
- Water plants
- Keep physical office clean/in order
- · Charge Ring bi-weekly on Fridays
- Start Music/News on TV
- · Clean out Fridge/Put water bottles in it
- Adding links to e-file for our records (practice advisories, samples, etc.)
- Case Closing Process (MS/NS/ST/MA)
- Client Closing Letters (File Copy)
- Withdrawals, Close Case mtg
- Future Case Board, or Visa Monitoring (ST/NS)
- Handle File Requests (MS)
- Close in Systems (Invoice + Deals Board)
- ST Email Management (MS)
- ST Scheduling (MS)

# LEGAL WORK

- # of Submitted USCIS
- # of Submitted EADs
- # of RFE Received (Track Type)
  - Goal 5 10 pr wk

#### Track

- Length of time from the signup everything from client
- Length of time from "everything from client" - submission

#### # Active cases

- Evidence/Package
  - Consultations
  - Caseload/person
  - Case strategy
  - ID professional Development
  - Opportunities
     Congressional
  - Assistance
     Investigations
  - Legal Team Updates (Policies, Cases, Rules, etc.)

# HR/FINANCE

**MARCELO** 

#### Onboarding/Offboarding + Training (Admin)

- Onboarding/OffboardingHR onboarding/exit
- Training Schedule
- Worker (pav)
- Systems Update
- Monday/GTC/Slack/Gmail/ DW/Pipefile/Calendly
- LastPass
- Employee HB + SOP
- Office Eqpt + Physical Office Check\*
- Notify Website/Social Media Team for updates (Adrianna/ Gabby)

#### TIL Credentials (MS)

- Last Pass Mgmt
- IT (LA)
- Office Eqpt
- IT Issue + Updates
- Smith.ai (NS/ST)
- FT Employee Benefits (Health Insurance, 401K) (SKT)
- Payroll/PTO Gusto Management (SKT)
- Celebration committee (LA)
- Staff Bday, Work Anniv
- Intern AppreciationLease management (SKT)
- Bank deposits/Petty Cash Acct (ST, NS)
- Conflict Resolution + Performance Eval (ST)
- · One-on-one meeting
- Reviews
- Bookkeeping (Bench.co)
- · Accounting (Kelly Rohrs/ST)
- Taxes (Kelly Rohrs/ST)
- Accounts Receivable (MS)
- Accounts Payable (SKT)

#### Track:

- Expenses (Total + People v. Other)
- Avg Hrs per Contract Worker (pay)
- Expenses (Total + People v. Other)
- · Avg Hrs per Contract

### MARKETING ADRIANA

- Reviews (Google + FB)
- Followers (FB, IG, TT, YT)
- Platform Engagement (monthly winner)
- ID Professional Development Opportunities\* (AP)
- Campaigns (AP)
- Demographics Stats
- EventsEvent planning
- Event Execution
- Digital Marketing (CGI Gabby)
- SEO
- Website (ST)

Social Media (AP)

- Google Business Management
   Ads
- Daily content post distribution

Content platform adaptation

- Daily video distribution
- Content approval (ST)
- Photos (Clients, Team, ST, etc.) (RVA Team)\*
- Video shooting (ST)
- Video production
- Comments/messages management (ST)
- Monthly marketing strategy (ST approval)

#### · Tracking:

- · Number of Client Photos
- Number of ST videos per platform

# **Taghavi Immigration Law**

Accountability Chart

EOIR (LA)

· Prepare files for court

BIA Appeal (NS)

· OCC/EOIR Follow up

Confirm court hearing

· Video/Telephonic Hearings

· Biometrics Stamp Copies for IH

Motions

Translations

· Get GAL info

· Contact GAL

· Contact Client

Client follow up

Court appearance

· Service of Process

· Reset dates schedule

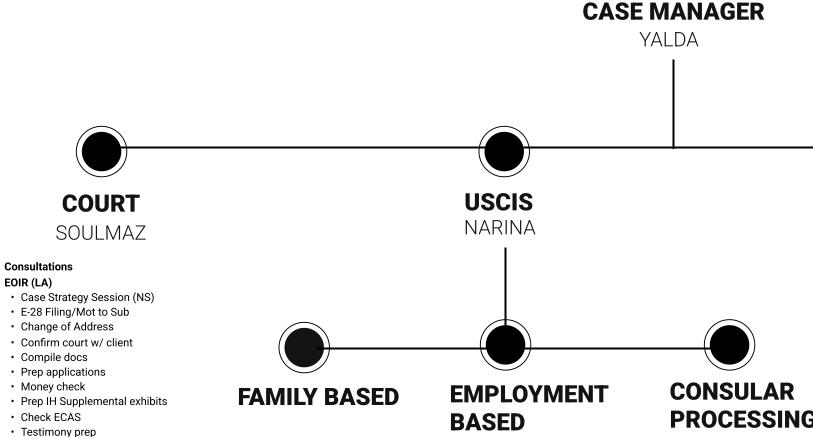
Juvenile (NS)

Motions

· Confirm Court appearances w/ atty +

· Confirming Court/WebEx appearances





- Case matter setup (MA)
- · Case Strategy Session (NS)
- Prepare applications (MA)
- Declarations (MA)
- Translations
- · Prepare Pkg (Evidence, Forms,
- · Client Review Approval -Signature w/ fees (NS)
- Review/edit packet (NS)
- Post to STR (NS)
- · Final Review w/ Atty Signatures
- · File/Mail package
- · Case update with clients (NS/ST)
- · Change of Address
- Prep for interview (ST) / Package prep (NS)
- · Attend interview Confirm w/ client or Atty Hire (ST - in prep
- EADs (NS CSS; MA submission to NS/filing)
- RFE/NOIDS/Appeals (NS)
- · Outside Normal Processing (NS)

# **BASED**

- · Case matter Set up (MA)
- Case Strategy Session (YH/
- Prepare applications
- Translations
- · Prepare Pkg (Evidence, Forms,
- · Client Review Approval -Signature w/ fees
- · Review/edit packet
- Post to STR
- · Final Review w/ Atty
- Signatures
  - File/Mail package · Case update with clients
  - · Change of Address (MA)
  - RFE/NOIDS/Appeals (YH)
  - Outside Normal Processing (NS)

# **PROCESSING**

**EAD** 

YALDA

· Case matter setup (MA)

· Prepare and file (MA)

Case strategy session (NS)

- Prepare application
- · Compile evidence
- · Submit evidence/DS Forms
- Prep/Schedule Interview (NS/ST)

### **INVESTIGATIONS**

YALDA

- · Attorney review
- · Review with client

## **FOIA**

- YALDA Prepare and file (MA)
- · Attorney review
- · Review with client