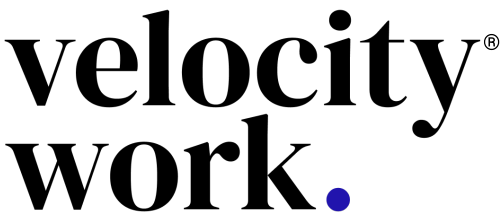


Taghavi Immigration Law

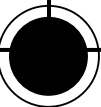
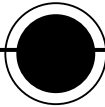
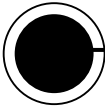
Accountability Chart

Updated 9/8/23



VISIONARY
SOULMAZ

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



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 e-file)
 - 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
SOULMAZ

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

- # of overdue invoices (3, 7 & 30 days) - weekly
- Total Revenue per month - weekly
- Average Revenue per USCIS Case Type (Goal: \$5,500)
 - Average Revenue per EOIR Case Type
 - Total Revenue per month
 - Total Expense (People)
 - Total Expense (Overhead)
 - Total Operating Expenses

- Formal HR Requests: (ST)
 - Employment Verification
 - Employee/Intern Letter of Recommendation
 - Employment status (raise, bonus, FT/PT, hrs, hire) (ST)
- Informal HR Requests (NS)
 - Submit through Monday
 - Weather/Office Closure/Emergency (NS/ST)
 - Late (#Team + #calendar or call EE/NS)
 - Leave Request (Medical, Sick, PTO/TO)
 - HR Service Request
 - WFH
 - Reimbursement/Add Hours
 - Update Personal Info
 - General HR questions/Issues
- HR Approval - Follow Steps (TIL Team)
 - Leave Assm Mtg; Reassign Calendly
 - OOO Msg - Gmail, Calendar, vm
 - Recap Email to Team before Leave

HR/FINANCE
MARCELO

- Onboarding/Offboarding + Training (Admin)
 - Onboarding/Offboarding
 - HR onboarding/exit
 - Training Schedule
 - Worker (pay)
 - 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 Appreciation
- Lease management (SKT)
- Bank deposits/Petty Cash Acct (ST, NS)
- Conflict Resolution + Performance Eval (ST)

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
- Events
 - Event planning
 - Event Execution
- Digital Marketing (CGI - Gabby)
 - SEO
 - Website (ST)
 - Google Business Management
 - Ads
- Social Media (AP)
 - 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

