# **Kendall Law**

# **Accountability Chart**

Updated: 10/25/23



- % of Converted Reviews
- Answering phone calls (RL)
- · Watering plants (RL)
- Changing water in cooler (MA/RL)
- Taking out trash (MA/RL)
- Yearly review of ins policies (MIG)
- Updating employment posters (MIG)
- Filing away judgements (RP)
- Year end clean up (MIG)
- Filing paper receipts and invoices (MIG)
- Taking inventory of supplies (RL)
- Ordering supplies (RL)
- · Stocking bathroom supplies (MA)
- · Organzing and throwing celebrations (RL)
- Filling printer paper trays (MA)
- Closing files (MA)
- Monitoring and upkeep of passwords (MIG)
- Send review requests (MA)
- Review followup (MA)

· Consultations (EMK)

before going out (RA)

Prepare necessary Notices (RP)

Prepare Complaint package (RP)

Obtain responsive pleading (RP)

• Review and approve all documents

Send client recommendation + cost (RA)

Prepare motions, including MSJ (RP)

Case strategy (RA)

· Wins/Success sheet completion (MIG)

# INTAKE MARILYN

- # of New Matters
- · Post-consult conversion rate
- · New leads conversion without consult
- Answering phone calls (MS)
- · Schedule consultations (MS)
- Intake followup (MS)

**UNLAWFUL DETAINER** 

ALICE.

· Number of Attorney Billable Hours

· Number of Paralegal Billable Hours

Tenant (RA)

• File processed in 30 days, 60 days, 90 days

Formulating discovery plan (RA)

· Confirm motion dates (RP)

Default package preparation (RP)

· Writ package preparation (RP)

· Entering deadlines (RP)

Prepare Opposition to Motions (RA)

· Review and respond to discovery from

• Prepare discovery to be sent to client (RP)

- · Consultation reminder calls (MS)
- Consultation f/u calls (MS)
- · Preparing engagement letters (MS)
- F/u on consultation payment (MS)

**REAL ESTATE** 

**EILEEN** 

Sheriff package preparation (RP)

Prepare witness list (RA)

· Prepare exhibit list (RA)

· Meet and confer (RA)

· File jury documents (RP)

Prepare jury instructions (RA)

Prepare statement of case (RA)

· Prepare exhibit notebook (RP)

Court appearances (RA)

· Jury Trial Prep (RA)

F/u on retainer payment (MS)

- F/u on signing letters (MS)

### **CLIENT SERVICES**

#### **EILEEN**

- # of unhappy client instances
- · Number of billable Attorney Hours
- Number of billable paralegal hours
- · Fact gathering/litigation memo (RA)
- · Client updates (RA)
- · Processing mail (MA)
- for attorneys (MA)

**OTHER** 

EILEEN

· Consultations (EMK)

· Lease drafting (CA)

· Lease review (CA)

· Contract drafting (CA)

Contract review (CA)

Deed drafting (CA)

· PCOR drafting (CA)

· Submit deed package to recorder (RP)

· Editing and proofing documents (RP)

#### Finalizing documents (RP) · Signing documents (RA)

**VISIONARY** 

FII FFN

**OPERATIONS** MARIA

· Revenue to Goal

· Culture (EK)

· Thinking time for the business (EK)

Provide Monthly Reports to Visionary

· Referral fees to be paid (MIG)

Quarterly Top referral sources (MIG)

Past due receivables (MIG)

· Lead Friday Team meeting (MA)

· Bi-vearly reviews (EMK)

Hiring/Firing (EMK)

- · Calls to the court for status updates (RP)
- Coordinate calendaring and appearances Calls to the sheriff for status updates (RP)
  - · Sending documents to clients (RP)

### CASE MANAGER

- % of 30 Days Collection **ARMAND**
- · New client data entry (MA)
- Ensuring docs are received (MA)
- · Initial client contact (RP)
- 15-day check-ins (AS)
- · Exit interviews (AS)

**CIVIL DISPUTES** 

FII FFN

- Consultations (EMK)
- · Case strategy (RA)
- Formulating dicovery plan (RA)
- · Executing dicovery plan (RA)
- · Reviewing motions (RA)
- · Write opposition (RA)
- · Confirm motion dates (RP)
- · Entering deadlines (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)

 Signing Checkes (EMK/MIG) · Input data into Airtable (MIG)

· Weekly Leadership Meeting (MIG)

Vacation approval (EMK)

- · Closed Case Info (MA) · UD Property Management (MA)
- Marketing (MS)
- · Firm Financial (MIG)
- · Producer Info (MIG)

**MARKETING** 

#### EILEEN Leads

- · Social media content (EMK)
- · Social media posts (VA)
- · Website content (EMK)
- Website management (Localista)
- · Arranging speaking engagements (MIG)
- · Quarterly thank you to referral partners (RL)
- · Holiday gifts for referral partners (RL)
- · Speaking Engagements (EMK)
- · Pens and Material to Eileen (MIG/RL)

- Total Income
- Expense · Net Profit
- · % of Collections
- Entering AP (EMK)
- Paying AP (EMK)
- Payroll (Lorena) • 401K contribution entry (Lorena)

**FINANCE** 

**EILEEN** 

velocity work.

- · Reconciling accounts (Lorena)
- · Yearly tax preparation (Lorena)
- · Generate monthly P&L (Lorena)
- · Collections (AS)
- A/R **(AS)**
- · Trust replenishment request (AS)



## · Consultations (EMK)

· Gather information (MH)

**EILEEN** 

- · Prepare operating agreement (CA)
- · Prepare SOS forms (CA)
- Obtain EIN (CA)
- · File LLC documents with SOS (CA)
- · Update client (CA)



# **Kendall Law**

# **Accountability Chart**

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### **VISIONARY**

FII FFN

- Thinking time for the business (EK)
- Culture (EK)

### **OPERATIONS**

MARIA

- Revenue to Goal
- · Provide Monthly Reports to Visionary
  - Referral fees to be paid (MIG)
  - · Past due receivables (MIG)
  - · Quarterly Top referral sources (MIG)
- · Lead Friday Team meeting (MA)
- · Bi-yearly reviews (EMK)
- · Hiring/Firing (EMK)
- Vacation approval (EMK)
- · Weekly Leadership Meeting (MIG)
- · Signing Checkes (EMK/MIG)
- · Input data into Airtable (MIG)
  - · Closed Case Info (MA)
  - · UD Property Management (MA)
  - · Marketing (MS)
  - · Firm Financial (MIG)
  - Producer Info (MIG)



velocity work.

## ADMIN

- · Answering phone calls (RL)
- · Changing water in cooler (MA/RL)
- Taking out trash (MA/RL)
- · Yearly review of ins policies (MIG)
- Updating employment posters (MIG)
- Filing away judgements (RP)
- Filing paper receipts and invoices
- · Taking inventory of supplies (RL)
- · Ordering supplies (RL)
- Stocking bathroom supplies (MA)
- · Organzing and throwing celebrations
- · Closing files (MA)
- · Monitoring and upkeep of passwords (MIG)
- Send review requests (MA)
- Review followup (MA)

# INTAKE

MARILYN

- # of New Matters
- · Post-consult conversion rate
- New leads conversion without
- · Answering phone calls (MS)
- · Schedule consultations (MS)
- · Intake followup (MS)
- · Consultation reminder calls (MS)
- · Consultation f/u calls (MS)
- · Preparing engagement letters
- f/u on signing letters (MS)
- f/u on consultation payment
- f/u on retainer payment (MS)

### **CLIENT SERVICES**

#### **EILEEN**

- # of unhappy client instances
- · Number of billable Attorney Hours
- · Number of billable paralegal hours
- · Fact gathering/litigation memo (RA)
- · Client updates (RA)
- · Processing mail (MA)
- · Coordinate calendaring and appearances for attorneys (MA)
- · Editing and proofing documents (RP)
- · Finalizing documents (RP)
- · Signing documents (RA)
- · Calls to the court for status updates
- · Calls to the sheriff for status updates
- · Sending documents to clients (RP)

### **MARKETING**

EILEEN Leads

- · Social media content (EMK)
- · Social media posts (VA)
- Website content (EMK)
- Website management (Localista)
- · Arranging speaking engagements
- · Quarterly thank you to referral partners (RL)
- Holiday gifts for referral partners
- Speaking Engagements (EMK)
- Pens and Material to Eileen (MIG/

## **FINANCE**

**EILEEN** 

- Total Income Expense
- · Net Profit
- % of Collections • Entering AP (EMK)
- · Paying AP (EMK)
- · Payroll (Lorena)
- 401K contribution entry (Lorena)
- Reconciling accounts (Lorena) Yearly tax preparation (Lorena)
- Generate monthly P&L (Lorena)
- · Collections (AS)
- A/R (AS)
- · Trust replenishment request (AS)



### **CASE MANAGER**

- % of 30 Days Collection **ARMAND**
- · New client data entry (MA)
- · Ensuring docs are received (MA)
- · Initial client contact (RP)
- 15-day check-ins (AS)
- · Exit interviews (AS)



## EILEEN

**CIVIL DISPUTES** 

- · Consultations (EMK) · Case strategy (RA)
- Formulating dicovery plan (RA)
- Executing dicovery plan (RA)
- · Reviewing motions (RA)
- · Write opposition (RA) · Confirm motion dates (RP)
- · Entering deadlines (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)



### **BUSINESS**

**EILEEN** 

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



#### · % of Converted Reviews

- · Watering plants (RL)

- · Year end clean up (MIG)

- · Filling printer paper trays (MA)
- · Wins/Success sheet completion (MIG)



**EILEEN** 

## **UNLAWFUL DETAINER**

- **ALICE**
- File processed in 30 days, 60 days, 90 days · Number of Attorney Billable Hours
- · Number of Paralegal Billable Hours
- · Consultations (EMK) · Case strategy (RA)
- · Prepare necessary Notices (RP)
- · Prepare Complaint package (RP)
- out (RA) · Obtain responsive pleading (RP)
- Send client recommendation + cost (RA) · Prepare motions, including MSJ (RP)
- · Formulating discovery plan (RA) • Prepare discovery to be sent to client (RP)
- · Prepare Opposition to Motions (RA) • Review and respond to discovery from Tenant (RA)
- · Confirm motion dates (RP)
- Entering deadlines (RP) · Default package preparation (RP)
- · Writ package preparation (RP) Sheriff package preparation (RP)

· Prepare witness list (RA)

- Court appearances (RA) · Jury Trial Prep (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)





- · Consultations (EMK) · Lease drafting (CA)
- · Lease review (CA) Contract drafting (CA)
- · Contract review (CA) · Deed drafting (CA)

recorder (RP)

 PCOR drafting (CA) Submit deed package to