# Liberty Law Accountability Chart

velocity® work.





# **VISIONARY**

# **BILL**

- Super Thinking Time (Bill)
- Mentorship-Attorneys (Bill)
- Culture (Drake)
- Signing Checks (Bill)
- Drive Firm Forward Towards Vision - (Bill)



# **OP**

# CRISTA

- · Tracking/Reporting
- · Project Oversite
- · Team Development/Training
- Meetings
- · HR

**LEGAL WORK** 

BILL



# **MARKETING**

# CRISTA

- # Leads (Crista)
- #/% of Qualified Leads into Firm
- · Rankings (Crista)
- Lead Sources (all) (Crista)
- Brand Overall (Bill)
- Marketing Coordinator/Liason (Crista)
- Dashboard Monitoring (Crista)
- Liason for Imperical (Crista)
- · Internet Lead Sources (Crista)
- · Liason for In-Front (Crista)



### INTAKE

# BILL

- · Qualifying Leads
- Conversion
- · First Impression
- · Send Fee Agreement -(LA)
- · Collect Retainer -(LA)



# **CRISTA**

- · P&L
- AR
- Collectig
- Budget
- · ROI
- · Trust Acct.
- Billing Payroll
- AP
- \$ AR 30/60/90
- % Collections Rate

# **TECH/SYSTEMS**

- **CRISTA**
- · Efficiencey Monitoring
- Automation
- Uniformity

# **CRIMINAL LAW**

# BILL

# · Sucessful Outcomes

- Win vs Loss · Degree of the Win
- · Client Satisfaction
- # Update Calls
- # Complaints Calls

Consults -(RA) Send Fee Agreement -(LA)

Collect Retainer -(LA)

Open The FIle -(LA)

Filing EOA -(LA)

Order Discovery -(LA)

Calendar Court Appearances -(LA) Notify Client Of Court Appearances -(LA)

- · DUI
  - · Contact DMV -(PA)
  - Send Letter of Representation -(PA)
  - Monitor for Hearing -(PA) • Calendar Hearing -(PA)
  - Review Reports -(RA)
  - · File Subpeonas -(PA
  - Serve Subpeonas -(LA)
  - Meet with Client -(RA)
  - Hold Hearing -(RA)
  - Notify Client of Results -(PA)
  - Send Reinstatement Info -(PA)

- Download Discovery -(PA)
- Notify Attorney of Discovery -(PA)
- Set Appt. w/ Client to Review -(PA) • Review Discovery -(RA)
- - Procedural Motion Drafting- (PA)
  - Drafting- (PA) • Reveiw - (RA)
  - File -(PA)

  - Substinitive Motion Drafting -(RA)
  - Review -(RA)
- File -(PA)
- Client Meeting -(RA)
- Provide Client Referrals -(PA)
- Court Appearances -(RA)
- Meet with DA -(RA)
- Set Client Appointment to Review Offer/Strategy -(LA)
- · Client Meeting to Review Offer/Strategy -(RA)
- · Set client appoitment to Sign Paperwork -(LA)
- · Client Meeting to Sign Paperwork -(RA)
- · Close out File -(LA) · Review Close -(PA)

# **FAMILY LAW**

# DRAKE

# · Sucessful Outcomes

- · Win vs Loss
- · Degree of the Win
- · Client Satisfaction • # Update Calls
  - # Complaints Calls

### **Attorney**

- Consult
- · Review Financial Discloures
- · Hold Hearing/Mediation
- · Negotiation with OP
- · Reivew Motions
- Talk to Witnesses
- Prepare for Hearing · Reveiw Motion to Appoint Expert
- JTMC & Exhibits List Prep
- Hold Hearing
- · Draft Order
- · Review Draft Decree & Support Order
- · Loose End Review
- Assign Loose End Tasks
- · Review all drafts of pleadings

### **Paralegal**

Case Management Schedule Deadlines

Collect & Compile Financial Disclosures

File Disclosures + Provide to OP

espond/ Prepare Written Discovery

Review Written Discovery

Draft Motions File Motions

Prepare & File Witness List

Motion to Appoint Expert

Draft Motion to Appoint Expert File Motion to Appoint Expert

Find Experts

Monitor Client/Expert Contact Prep and Serve Subpoenas

Compile Exhibits & File Draft Decree & Support Order

Schedule Mediation

### **Legal Assistant**

Open The File

File EOA

Schedule Attorney/Paralegal Meeting

Prepare Initiating Docs

Schedule Hearings + Settings Set Client Meeting Client Meeting

Close File

**Call Routing** 

Download E-file Docs Served Notify RA + PA E-file Docs Served Notify Clients E-File Docs Served