

# Taghavi Immigration Law

## Accountability Chart

Updated 6/13/2024

### VISIONARY

(ST)

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



### GROWTH

(ST)

### INTERNAL OPERATIONS

(NS)

### LEGAL WORK

(ST)

### HR

(NS)

### FINANCE

(NS)

### SALES TEAM

(LV)

### MARKETING

(TA)

#### KPI

- Conversion rate of consult to client (%)
- # of new EB cases

- Facebook, Website, and Super Lawyers Leads
- Intake + Screening + QL
  - Case evaluations
- QL + Consult to Client Follow-Ups
- Calendar Management (BH)
  - Rescheduling - Conflict
  - Check EOIR + MCH/IH Calendar
  - Client MCH/IH Attendance via Gmail Invite
- Contracts
- CRM Management

#### Track: (LV)

- Total leads per month
- Total of QL identified
- # of new case per month

#### KPI

- # of qualified leads
- Google New Reviews

- Social Media (AP)
  - Content schedule
  - Content material
  - Content categories
  - Content production
  - Demographics + statistics
  - Podcast
  - Lives
- Guerilla Marketing (ST)
  - Communities
  - Non-Profits
  - Businesses
  - Vendors
  - Other lawyers
- Swag (NS)
- Community Outreach (ST)
  - Language schools
  - Legal workshops
- Blogs (AP)
- Newsletters (AP)
- Billboards (ST)
- Iranian website and Whatsapp
- Team Branding (ST)
- Reviews
- Networking
- Hosting Legal Workshops
- Referral Program (NS)
  - Clients
  - Vendors
  - Partners
- ID Professional Development Opportunities (ST)
- Events (TA)
  - Event planning
  - Event Execution
- Digital Marketing (CGI - Gabby)
  - SEO
  - Website (ST)
  - Google Business Management
  - Ads
- Customer Experience (NS)
  - Referral partner strategy program
  - Potential Client appreciation program
  - Current client appreciation program
  - Closed client appreciation program
- Tracking: (AP)
  - New Google reviews
  - TikTok new followers
  - YouTube new subscribers
  - Instagram new followers
  - Facebook new followers
  - Platform engagement
  - Most watched video

#### KPI

- # EC call (Total)
- # of closed cases

- Performance Meeting
  - Answer Meeting
  - Appreciation Meeting
- Scorecard Meeting
- Case Matter Set Up (BH)
- Systems Management
- Mail Processing (BH)
- Document Management (BH)
  - Mail pick-up/Scan/Processing (save to e-file)
  - File away/Shred Notices
  - Fax Receipt + Distribution
  - Document Collection Process (Pipefile Upload)
  - Create Physical Files
- Receptionist Quality Assurance & Daily Call Summary
- Smith.ai (SM)
- Office Management (BH)
  - Office Supplies Request
  - Water plants
  - Keep physical office clean/in order
  - Charge Ring bi-weekly on Fridays
  - News on TV
  - Clean out Fridge/Put water bottles in it
- Adding links to e-file for our records (practice advisories, samples etc) (BH)
- Case Closing Process (BH)
  - Client Closing Letters (File Copy)
  - Withdrawals, Close Case mtg
  - Future Case Board, or Visa Monitoring
  - Handle File Requests (ES)
  - Close in Systems (Invoice + Deals Board)
- ST Email Management (New Legal Secretary)
- ST Scheduling (New Legal Secretary)
- Auditing
  - Departments
  - Individuals
- IT
  - Office Eqpt
  - IT Issue + Updates
- Track: (SM)
  - # of closed cases per month (BH)
  - # of returning clients

- # Active cases
- Evidence/Package Review
- Consultations
- Caseload/person
- Case strategy
- ID professional Development Opportunities
- Congressional Assistance
- Investigations
- Legal Team Updates (Policies, Cases, Rules, etc.)
- Track (FB)
  - # of Submitted EAD per month
  - # of RFE's received per month (type)
  - # of rejected packages (BH)

#### Formal HR Requests:

- 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 NS)
  - Leave Request (Medical, Sick, PTO/TO) (ST)
  - HR Service Request (ST)
  - WFH (ST)
  - Reimbursement/Add Hours (ST)
  - Update Personal Info
  - General HR questions/Issues
- Track (NS)
  - Expenses (Total + People v. Other)
  - Avg Hrs per Contract Worker (pay)
  - Expenses (Total + People v. Other)
  - Avg Hrs per Contract
- Onboarding/Offboarding + Training (BH)
  - 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 (BH)
  - Last Pass Mgmt
- FT Employee Benefits (Health Insurance, 401K) (SKT)
- Payroll/PTO Gusto Management (SKT)
- Celebration committee (BH)
  - Staff - Bday, Work Anniv
  - Intern Appreciation
- Conflict Resolution + Performance Eval (ST)
  - One-on-one meeting
  - Reviews

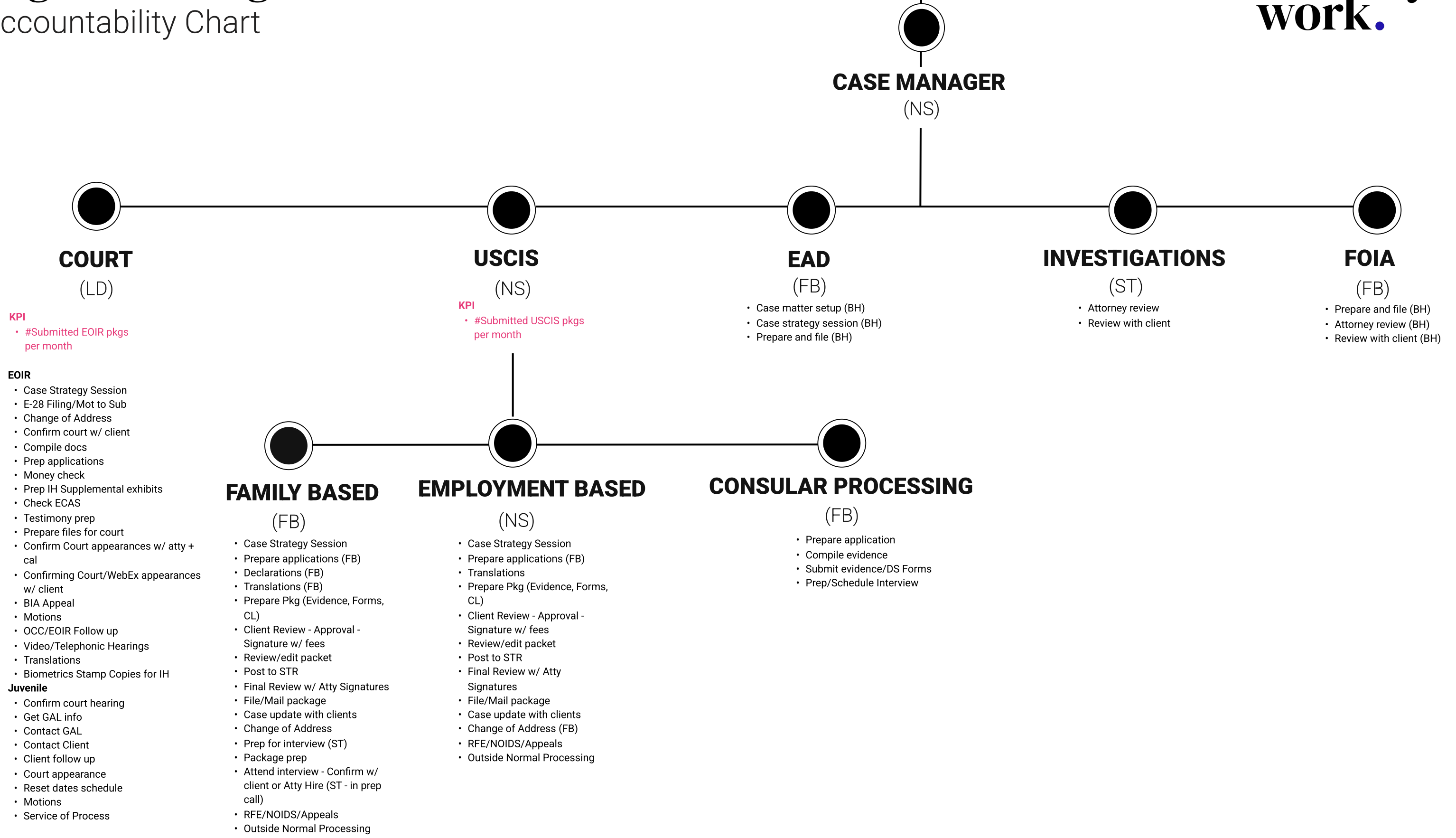
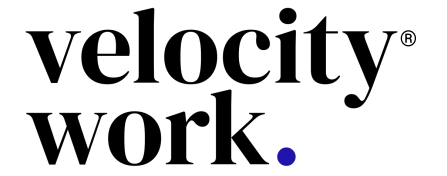
#### KPI

- Overdue \$ Amount

- Refunds
- Lease management (ST)
- Bank deposits/Petty Cash Acct (NS)
- Bookkeeping (Bench.co) (ST)
- Accounting (Kelly Rohrs) (ST)
- Taxes (Kelly Rohrs) (ST)
- Accounts Receivable (SM)
- Accounts Payable (SM)
- Track (SM)
  - # of overdue invoices per month (30-day overdue)
  - \$ amount of overdue invoices collected

# Taghavi Immigration Law

## Accountability Chart



**KPI**

- #Submitted EOIR pkgs per month

**EOIR**

- Case Strategy Session
- E-28 Filing/Mot to Sub
- Change of Address
- Confirm court w/ client
- Compile docs
- Prep applications
- Money check
- Prep IH Supplemental exhibits
- Check ECAS
- Testimony prep
- Prepare files for court
- Confirm Court appearances w/ atty + cal
- Confirming Court/WebEx appearances w/ client
- BIA Appeal
- Motions
- OCC/EOIR Follow up
- Video/Telephonic Hearings
- Translations
- Biometrics Stamp Copies for IH

**Juvenile**

- Confirm court hearing
- Get GAL info
- Contact GAL
- Contact Client
- Client follow up
- Court appearance
- Reset dates schedule
- Motions
- Service of Process

**KPI**

- #Submitted USCIS pkgs per month

• Case matter setup (BH)

• Case strategy session (BH)

• Prepare and file (BH)

• Attorney review

• Review with client

• Prepare and file (BH)

• Attorney review (BH)

• Review with client (BH)

**FAMILY BASED (FB)**

- Case Strategy Session
- Prepare applications (FB)
- Declarations (FB)
- Translations (FB)
- Prepare Pkg (Evidence, Forms, CL)
- 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
- Prep for interview (ST)
- Package prep
- Attend interview - Confirm w/ client or Atty Hire (ST - in prep call)
- RFE/NOIDS/Appeals
- Outside Normal Processing

**EMPLOYMENT BASED (NS)**

- Case Strategy Session
- Prepare applications (FB)
- Translations
- Prepare Pkg (Evidence, Forms, CL)
- 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 (FB)
- RFE/NOIDS/Appeals
- Outside Normal Processing

**CONSULAR PROCESSING (FB)**

- Prepare application
- Compile evidence
- Submit evidence/DS Forms
- Prep/Schedule Interview