# Jeff Lewis Law Accountability Chart

Updated: 7/2024



velocity work.

- Client selection (Jeff)
- Case strategy (Jeff)
- Culture (Jeff)
- Growth and development of firm (Jeff)
- Setting goals (Jeff)
- On-the-business development (Jeff)
- Mentoring/teaching (Jeff)



## **ADMINISTRATION JASON**

# **OPERATIONS**

# **MARKETING JEFF**

- Incoming Calls (SmithAl & Jammie)
- Personal Marketing (Jeff)
- Provisors, Chambers, Inns
- Tracking Referral Partners (Jammie)

### Electronic Marketing

- CALP (Jeff)
- SendOut Cards (Jeff/VA)
- Lunches (Jeff)
- SuperLawyers (Jeff)
- Facebook (Jason)
- EFF (Jeff)
- Social Media
  - Content Creation (VA)
  - Proofing/Approval (Jason + Kyla)
  - Posting (VA)



### Billing (Jason)

- Running Bills (Jason)
- Collections (Jason)
- Client Communications ((Jason/ Renee)
- Expense Entries (Jason)

### Finance

- Bank Deposits (Jammie)
- Reviewing monthly P+L (Jeff)
- Accountant liaison (Jeff)

### • **HR** (Jeff)

- Days off and hours tracking (Jason)
- Payroll (Jason)
- Compensation (Jeff)
- Hiring/Termination (Jeff+Jason)
- Performance Reviews (Jeff+Jason)
- Hours Meetings (Jason)
- Celebrations (Renee+Jammie)

Accounts payable (Jason)

Mail Processing (Jammie)

Malpractice Insurance (Jeff)

Airtable Data entry (Jason)

(Jason)

Intake

Measurements/tracking (Jason)

CorporateCompliance and Licensing

Retainer Agreement (Jammie)

Slack/Clio/Onedrive (Jason)

Calendaring deadlines (Jammie)

• Documents from Trial Counsel

Conflict Waiver (Jason)

Payment Link (Jason)

Case Management

(Jammie)

# **APPEALS JEFF**

- Record (Jason)
  - Designation (Jason)
  - Prepare Appendix (Jason)
  - Purchased or Borrowed (Jason)
  - Verified, Augment or Complete (Jason)

### • **Briefing** (Jeff)

- Outline issues (Jeff)
- Draft brief (Jeff)
- Hyperlinked and Polished (Jason)
- Argument (Jeff)
- Refreshing Research (Jeff)
- Post-Opinion (Jeff)
- Assist with fee motion (Kyla)
- Counsel clients on appeals (Jeff)
- Close File (Jammie)
- Ask for Testimonial (Jammie)

### Writs

- Calendaring deadlines (Renee)
- Documents from Trial Counsel (Renee)
- Briefing (Jeff)
  - Outline Issues (Jeff)
  - Draft Brief (Jeff)
  - Research Issues (Jeff)
- Hyperlinked and Polished (Jason) Return of Writ (Jason)
- Counsel client on appeals (Jeff)
- Close file (Jammie)
- Ask for Testimonial (Jammie)

# **LITIGATION JEFF**

- Pleadings (Jeff)
  - Outline Issues/Claims (Jeff)
  - Draft pleading (Renee or Jeff)
  - Filed (Renee)
- **Discovery** (Jeff) Discovery plan (Jeff)
  - Airtable (Renee)
  - Opening round (Renee + Jeff)
- Respond to discovery (Renee + Jeff)
- Take and Defend Depos (Jeff)
- Expert Selection (Jeff)
- Expert Designation (Renee) Expert Depositions (Renee)
- Supplemental Discovery (Renee)
- Document Organization (Renee)

### ADR (Kyla)

- Trial prep (Jeff)
  - Witness list (Renee)
- Exhibit lists (Renee)
- Trial briefs (Jeff)
- MILs (Jeff)
- Tech issues (Jason)
- Jury instructions (Jeff)
- Opening statement (Jeff)
- Post-trial (Jeff)
- Post-trial motions (Jeff) Cost and fee motions (Jeff)
- Enforcement (Jeff) Perfecting appeal (Jason)
- Close file (Jammie) Ask for Testimonial (Jammie)

**SLAPPS** 

# **JEFF**

- Anti-SLAPP motion (Jeff) Issue Spotting (Jeff)
  - Reserve Hearing (Renee)
  - Draft client declaration (Jeff)
  - Draft motion (Kyla) Draft request for judicial notice (Jason)
  - Draft objections (Kyla) Draft reply (Jeff)
- Draft proposed order (Jeff)
- Draft fee motion (Kyla)
- Enforcement (Jeff)
- Perfecting Appeal (Jason) • Close file (Jammie)
- Ask for Testimonial (Jammie)



Client Meetings (Jeff)

**JEFF** 

- PowerPoint or Letter to Agency (Jeff)
- PRAs (Jason)
- Appear at Hearing (Jeff)
- Close File (Jammie)
- Ask for Testimonial (Jammie)

• Post Hearing Advice (Jeff)