Liberty Law Accountability Chart

velocity® work.



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



OP

CRISTA

Practice area revenue # of New cases **Net Cases**

Firm revenue

- Tracking/Reporting
- · Project Oversite
- Team Development/Training
- · Maintain company meetings schedule · Document management
- · Hiring / firing
- · Benefits management
- · Efficiencey Monitoring
- Automation · Uniformity
- Software
- · Conflict resolution



MARKETING

CRISTA

- # Leads (Crista) % of Qualified Leads % ROI on paid ads
- Tracking Rankings (Crista)
- Tracking Lead Sources (all) (Crista)
- · Brand Overall (Bill)
- Woosender Monitoring (Crista)
- · Liaison for SMB (Bill)
- · Liaison for FMO (Bill)
- · Building referral sources (Bill)

INTAKE

BILL

LEGAL WORK

BILL

Conversion rate

- # of Fee agreements sent
- # of Retainers signed w/i 30 days
- # of Personal follow-ups
- \$ CR New case values
- \$ DR New case values
- · Conduct consults
- · Send Fee Agreement
- F/U · Collect Retainer
- · Open the File

FINANCE

CRISTA

\$ AR 30/60/90 **Profit**

POD ROI

- · Generate monthly P&L
- AR
- Collecting
- Budget
- · Trust Acct. reconciliation
- Billing
- Payroll
- · 401K contribution entry
- · Yearly tax preparation



CRIMINAL LAW

BILL

- # of initial discovery meetings w/ clients
- # of contacts with opposing counsel
- # of sentencing set before trial # of cases set for trial
- # of sentencing set after trial
- # of trials

Attorney

- DUI
 - · Review Reports
 - · Meet with Client Hold Hearing
- · Review Discovery
- Motions
- Substantive Motion Drafting
- Review
- Client Meeting
- · Court Appearances
- Meet with DA
- · Client Meeting to Review Offer/Strategy
- · Client Meeting to Sign Paperwork

Paralegal

- DUI
 - · Contact DMV
 - · Send Letter of Representation
 - · Monitor for Hearing
 - Calendar Hearing
 - File Subpoenas
- Notify Client of Results
 - Send Reinstatement Info
- · Download Discovery
- · Notify Attorney of Discovery · Set Appt. w/ Client to Review
- Motions · Procedural Motion Drafting
 - Drafting
 - Review
 - File
- File Again · Provide Client Referrals
- Review Close

Legal Assistant

- Filing EOA
- · Order Discovery
- Calendar Court Appearances
- Notify Client Of Court Appearances
- - · Serve Subpoenas
- Set Client Appointment to Review Offer/Strategy
- · Set client appointment to Sign Paperwork
- · Close out File

FAMILY LAW BILL

- # of initiating documents filed
- # of financial disclosures filed
- # of contacts with opposing counsel
- # of settlements / mediations / hearings

Attorney

- · Consult
- · Review Financial Disclosures
- Hold Hearing/Mediation
- · Negotiation with OP
- · Review Motions
- Talk to Witnesses
- Prepare for Hearing • Review Motion to Appoint Expert
- JTMC & Exhibits List Prep
- Hold Hearing
- · Draft Order
- · Review Draft Decree & Support Order

Review all drafts of pleadings

 Loose End Review Assign Loose End Tasks

- Paralegal
- · Case Management
- · Schedule Deadlines
- · Collect & Compile Financial Disclosures • File Disclosures + Provide to OP
- · Respond/ Prepare Written Discovery
- · Review Written Discovery
- Draft Motions
- File Motions

Find Experts

- Prepare & File Witness List
- Motion to Appoint Expert · Draft Motion to Appoint Expert
- File Motion to Appoint Expert
- Monitor Client/Expert Contact • Prep and Serve Subpoenas
- · Compile Exhibits & File · Draft Decree & Support Order
- · Schedule Mediation

Legal Assistant

- Open the file • Schedule Attorney/Paralegal Meeting
- File EOA
- 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