Jeff Lewis Law Accountability Chart

Updated: 9/2024

• **Billing** (Jason)

Finance

• **HR** (Jeff)

Running Bills (Jason)

Expense Entries (Jason)

• Bank Deposits (Jammie)

Accountant liaison (Jeff)

Payroll (Jason)

Compensation (Jeff)

Hours Meetings (Jason)

Reviewing monthly P+L (Jeff)

Days off and hours tracking (Jason)

Hiring/Termination (Jeff+Jason)

Celebrations (Nora + Jammie)

Performance Reviews (Jeff+Jason)

Client Communications (Jason + Nora)

Collections (Jason)



velocity work.

- Client selection (Jeff)
- Case strategy (Jeff)
- Culture (Jeff)

OPERATIONS

- Growth and development of firm (Jeff)
- Setting goals (Jeff)
- On-the-business development (Jeff)
- Mentoring/teaching (Jeff)



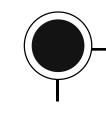
ADMINISTRATIONJASON

- Accounts payable (Jason)
 - Mail Processing (Jammie)
 - Malpractice Insurance (Jeff)
 - Measurements/tracking (Jason)
 - Airtable Data entry (Jason)
 - CorporateCompliance and Licensing (Jason)
 - Intake
 - Retainer Agreement (Jammie)
 - Conflict Waiver (Jason)
 - Payment Link (Jason)
 - Slack/Clio/Onedrive (Jason)
 - Case Management
 - Calendaring deadlines (Jammie)
 - Documents from Trial Counsel (Jammie)

MARKETING

JEFF

- Incoming Calls (SmithAI & 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 (Tim + Kyla)
 - Posting (VA)



APPEALSJEFF

- Record (Jason)
 Designation
 - Designation (Jason)
 - Prepare Appendix (Jason)Purchased or Borrowed (Jason)
 - Purchased or Borrowed (Jason)
 Varified Augment or Complete (
 - Verified, Augment or Complete (Jason)
- Briefing (Jeff)
 - Outline issues (Jeff)
 Draft brief (Kyla)
 - Draft brief (Kyla)
- Hyperlinked and Polished (Jason)
- Argument (Jeff)
- Refreshing Research (Jeff)
- Post-Opinion (Jeff)
 Assist with fee mot
- Assist with fee motion (Kyla)
- Counsel clients on appeals (Jeff)
- Close File (Jammie)
 Ask for Testimonial (
- Ask for Testimonial (Jammie)
- Writs
 - Calendaring deadlines (Nora)
 - Documents from Trial Counsel (Nora)
 - 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 (Nora or Jeff)
 - Filed (Nora)
- **Discovery** (Jeff)
 - Discovery plan (Jeff)
 - Airtable (Nora)
 - Opening round (Nora + Jeff)
 - Respond to discovery (Nora + Jeff)
 - Take and Defend Depos (Jeff + Kyla)
 - Expert Selection (Jeff)
 - Expert Designation (Nora)
 - Expert Depositions (Nora)
 - Supplemental Discovery (Nora)
 - Document Organization (Nora)
- ADR (Kyla)
- Trial prep (Jeff)
 - Witness list (Nora)
 Exhibit lists (Nora)
 - Exhibit lists (Nora)
 - Trial briefs (Jeff)
 - MILs (Jeff)Took issues
 - Tech issues (Jason)
 - Jury instructions (Jeff)
 - Opening statement (Jeff)
- Post-trial (Jeff)
- Post-trial motions (Jeff)
 Cost and fee motions (Jeff)
- Cost and fee motions (Jeff)Enforcement (Jeff)
- Perfecting appeal (Jason)
- Close file (Jammie)Ask for Testimonial (Jammie)

SLAPPSJEFF

- Anti-SLAPP motion (Jeff)
 - Issue Spotting (Kyla)
 - Reserve Hearing (Nora)
 - Draft client declaration (Jeff)Draft motion (Kyla)
 - Draft request for judicial notice (Jason)
 - Draft request for judicial no
 Draft objections (Kyla)
 - Draft objections (Kyla)
 Draft roply (Kyla)
- Draft reply (Kyla)
- Draft proposed order (Jeff)
- Draft fee motion (Kyla)Enforcement (Jeff)
- Perfecting Appeal (Jason)
- Close file (Jammie)Ask for Testimonial (Jammie)

LAND USE JEFF

- Client Meetings (Jeff)
- Pre-litigation letters (Tim)
- PowerPoint or Letter to Agency (Jeff)PRAs (Jason)
- Appear at Hearing (Jeff)
- Post Hearing Advice (Jeff)

Drafting pleadings (Tim)

- Conduct discovery (Tim)Trial (Jeff + Tim)
- Close File (Jammie)
- Ask for Testimonial (Jammie)