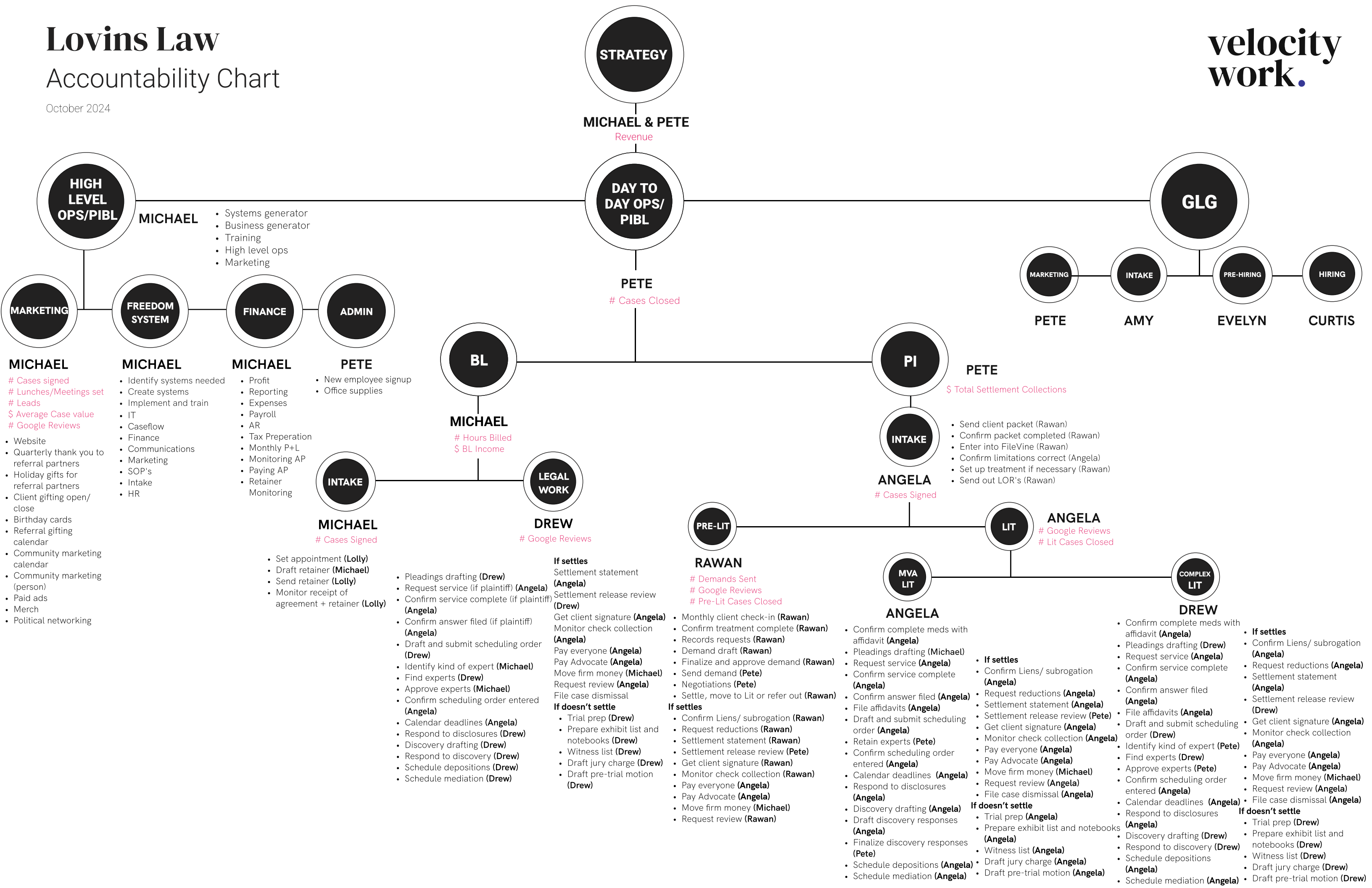


# Lovins Law

## Accountability Chart

October 2024

velocity  
work.



**STRATEGY**

**MICHAEL & PETE**

Revenue

**DAY TO DAY OPS/ PIBL**

**PETE**

# Cases Closed

**GLG**

**HIGH LEVEL OPS/PIBL**

**MICHAEL**

- Systems generator
- Business generator
- Training
- High level ops
- Marketing

**MARKETING**

**MICHAEL**  
# Cases signed  
# Lunches/Meetings set  
# Leads  
\$ Average Case value  
# Google Reviews

- Website
- Quarterly thank you to referral partners
- Holiday gifts for referral partners
- Client gifting open/close
- Birthday cards
- Referral gifting calendar
- Community marketing calendar
- Community marketing (person)
- Paid ads
- Merch
- Political networking

**FREEDOM SYSTEM**

**MICHAEL**

- Identify systems needed
- Create systems
- Implement and train
- IT
- Caseflow
- Finance
- Communications
- Marketing
- SOP's
- Intake
- HR

**FINANCE**

**MICHAEL**

- Profit
- Reporting
- Expenses
- Payroll
- AR
- Tax Preparation
- Monthly P+L
- Monitoring AP
- Paying AP
- Retainer Monitoring

**ADMIN**

**PETE**

- New employee signup
- Office supplies

**BL**

**MICHAEL**

# Hours Billed  
\$ BL Income

**INTAKE**

**MICHAEL**

- Set appointment (Lolly)
- Draft retainer (Michael)
- Send retainer (Lolly)
- Monitor receipt of agreement + retainer (Lolly)

**LEGAL WORK**

**DREW**

- Pleadings drafting (Drew)
- Request service (if plaintiff) (Angela)
- Confirm service complete (if plaintiff) (Angela)
- Confirm answer filed (if plaintiff) (Angela)
- Draft and submit scheduling order (Drew)
- Identify kind of expert (Michael)
- Find experts (Drew)
- Approve experts (Michael)
- Confirm scheduling order entered (Angela)
- Calendar deadlines (Angela)
- Respond to disclosures (Drew)
- Discovery drafting (Drew)
- Respond to discovery (Drew)
- Schedule depositions (Drew)
- Schedule mediation (Drew)

- If settles**
- Settlement statement (Angela)
  - Settlement release review (Drew)
  - Get client signature (Angela)
  - Monitor check collection (Angela)
  - Pay everyone (Angela)
  - Pay Advocate (Angela)
  - Move firm money (Michael)
  - Request review (Angela)
  - File case dismissal
- If doesn't settle**
- Trial prep (Drew)
  - Prepare exhibit list and notebooks (Drew)
  - Witness list (Drew)
  - Draft jury charge (Drew)
  - Draft pre-trial motion (Drew)

**PI**

**PETE**

\$ Total Settlement Collections

**INTAKE**

**ANGELA**

# Cases Signed

- Send client packet (Rawan)
- Confirm packet completed (Rawan)
- Enter into FileVine (Rawan)
- Confirm limitations correct (Angela)
- Set up treatment if necessary (Rawan)
- Send out LOR's (Rawan)

**PRE-LIT**

**RAWAN**

# Demands Sent  
# Google Reviews  
# Pre-Lit Cases Closed

- Monthly client check-in (Rawan)
- Confirm treatment complete (Rawan)
- Records requests (Rawan)
- Demand draft (Rawan)
- Finalize and approve demand (Rawan)
- Send demand (Pete)
- Negotiations (Pete)
- Settle, move to Lit or refer out (Rawan)
- Confirm Liens/ subrogation (Rawan)
- Request reductions (Rawan)
- Settlement statement (Rawan)
- Settlement release review (Pete)
- Get client signature (Rawan)
- Monitor check collection (Rawan)
- Pay everyone (Angela)
- Pay Advocate (Angela)
- Move firm money (Michael)
- Request review (Rawan)

**LIT**

**ANGELA**

# Google Reviews  
# Lit Cases Closed

**MVA LIT**

**ANGELA**

- Confirm complete meds with affidavit (Angela)
- Pleadings drafting (Michael)
- Request service (Angela)
- Confirm service complete (Angela)
- Confirm answer filed (Angela)
- File affidavits (Angela)
- Draft and submit scheduling order (Angela)
- Retain experts (Pete)
- Confirm scheduling order entered (Angela)
- Calendar deadlines (Angela)
- Respond to disclosures (Angela)
- Discovery drafting (Angela)
- Draft discovery responses (Angela)
- Finalize discovery responses (Pete)
- Schedule depositions (Angela)
- Schedule mediation (Angela)

- If settles**
- Confirm Liens/ subrogation (Angela)
  - Request reductions (Angela)
  - Settlement statement (Angela)
  - Settlement release review (Pete)
  - Get client signature (Angela)
  - Monitor check collection (Angela)
  - Pay everyone (Angela)
  - Pay Advocate (Angela)
  - Move firm money (Michael)
  - Request review (Angela)
  - File case dismissal (Angela)
- If doesn't settle**
- Trial prep (Angela)
  - Prepare exhibit list and notebooks (Angela)
  - Witness list (Angela)
  - Draft jury charge (Angela)
  - Draft pre-trial motion (Angela)

**COMPLEX LIT**

**DREW**

- Confirm complete meds with affidavit (Angela)
- Pleadings drafting (Drew)
- Request service (Angela)
- Confirm service complete (Angela)
- Confirm answer filed (Angela)
- File affidavits (Angela)
- Draft and submit scheduling order (Drew)
- Identify kind of expert (Pete)
- Find experts (Drew)
- Approve experts (Pete)
- Confirm scheduling order entered (Angela)
- Calendar deadlines (Angela)
- Respond to disclosures (Angela)
- Discovery drafting (Drew)
- Respond to discovery (Drew)
- Schedule depositions (Angela)
- Schedule mediation (Angela)

- If settles**
- Confirm Liens/ subrogation (Angela)
  - Request reductions (Angela)
  - Settlement statement (Angela)
  - Settlement release review (Drew)
  - Get client signature (Angela)
  - Monitor check collection (Angela)
  - Pay everyone (Angela)
  - Pay Advocate (Angela)
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