# Jeff Lewis Law Accountability Chart

Updated: 1/2025



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)



## **ADMINISTRATION JASON**

- **Billing** (Jason)
- Running Bills (Jason)
- Collections (Jason)
- Client Communications (Jason + Nora)
- Expense Entries (Jason)

#### Finance

- Bank Deposits (Nora)
- 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 (Nora + Jammie)

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

### **MARKETING**

#### **JEFF**

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

#### 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)



# **JEFF**

- **Record** (Jason)
  - Designation (Jason)
  - Prepare Appendix (Jason) Purchased or Borrowed (Jason)
  - Verified, Augment or Complete (Jason)
- **Briefing** (Jeff)
  - Outline issues (Jeff)
  - Draft brief (Kyla)
  - Hyperlinked and Polished (Jason)
- Argument (Jeff)
- Refreshing Research (Jeff)
- Post-Opinion (Jeff)
- Assist with fee motion (Kyla)
- Counsel clients on appeals (Jeff)
- Close File (Nora)
- Ask for Testimonial (Nora)
- 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 (Nora)
  - Ask for Testimonial (Nora)

# **LITIGATION JEFF**

- Pleadings (Jeff)
- Outline Issues/Claims (Jeff)
- Draft pleading (Jammie or Jeff) Court-filed (Jammie)
- **Discovery** (Jeff)
  - Discovery plan (Jeff)
  - Airtable (Jammie)
  - Opening round (Jammie + Jeff + Tim)
  - Respond to discovery (Jammie + Jeff)
  - Take and Defend Depos (Jeff + Kyla)
  - Expert Selection (Jeff)
  - Expert Designation (Jammie)
  - Expert Depositions (Jammie)
  - Supplemental Discovery (Jammie) Document Organization (Jammie)
- **ADR** (Kyla)
- Trial prep (Jeff)
  - Witness list (Jammie)
  - Exhibit lists (Jammie)
  - Trial briefs (Jeff)
  - MILs (Jeff) Tech issues (Jason)
  - Jury instructions (Jeff)
- Opening statement (Jeff)
- Post-trial (Jeff) Post-trial motions (Jeff)
- Enforcement (Jeff)
- Perfecting appeal (Jason)
- Cost and fee motions (Jeff)
- Close file (Nora) Ask for Testimonial (Nora)



**SLAPPS** 

**JEFF** 

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

Ask for Testimonial (Nora)



- 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 (Nora) Ask for Testimonial (Nora)