# **Kendall Law**

# **Accountability Chart**

Updated: 1/7/2024

### **LEGEND**

- MS Marilyn
- MIG Maria
  - RA Responsible Attorney

· AS - Armand

- **JF** Johnny
- RP Responsible Paralegal
- GM Gherabel
- SH Shalita Hammell
- LC Lauren Cruz
- EMK- Eileen Kendall
- IS Intake Specialist TS Tierra Sparks





### MARIA • % Reviews based on # of closed cases

- Watering plants (TS)
- · Changing water in cooler (TS)

**ADMIN** 

- Taking out trash (TS)
- Yearly review of ins policies (MIG)
- Updating employment posters (MIG)
- Filing away judgements (RP)
- Year end clean up (MIG)
- Filing paper receipts and invoices (MIG)
- Taking inventory of supplies (SH)
- Ordering supplies (SH)
- · Stocking bathroom supplies (TS)
- Organizing and throwing celebrations (LC)
- Filling printer paper trays (TS)
- Closing files and review request (TS)
- Monitoring and upkeep of passwords (LC)
- · Check in / out boxes to deliver Interoffice Mail (TS)
- Maintaining PM list (TS)
- · Ice Machine (SH)
- · Clean Fridge (SH)
- MCLE Tracking (SH)

· Consultations (EMK)

before going out (RA)

Prepare necessary Notices (RP)

• Prepare Complaint package (RP)

· Obtain responsive pleading (RP)

· Formulating discovery plan (RA)

Send client recommendation + cost (RA)

Prepare motions, including MSJ (RP)

· Review and approve all documents

Case strategy (RA)

- Maintain Team Roster (LC)
- Enter Holidays and Birthdays in the calendar (LC)

**UNLAWFUL DETAINER** 

• Prepare discovery to be sent to client (RP)

Prepare Opposition to Motions (RA)

• Entering dates in calendar (RP)

Default package preparation (RP)

· Updating whiteboard with monthly #'s (RP)

Writ package preparation (RP)

Review and respond to discovery from

FII FFN

Tenant (RA)

· Confirm dates (RP)

· Entering deadlines (RP)

## INTAKE

- # New Matters
- · % Reviews based on # of consultation
- Answering phone calls (SH)
- · Intake followup (IS)
- Consultation reminder calls (IS)
- · Consultation f/u calls (IS)
- · Preparing engagement letters (IS)
- F/u on signing letters (IS)
- F/u on consultation payment (IS)
- F/u on retainer payment (IS)
- · Maintaining addendums for PMs (IS)

### MARILYN

- # Post-consult conversion rate
- · # Sales without consult
- · # Leads total conversion
- · Schedule consultations (IS)

- · New file data entry (IS)
- · Review Requests (IS)

# **REAL ESTATE**

FII FFN

# **CLIENT SERVICES**

### **EILEEN**

- # Unhappy client instances
- · # Billable Attornev Hours
- # Billable paralegal hours
- · Fact gathering/litigation memo (RA)
- · Client updates (JF, RA, RP)

· Opening PM files (TS)

• PM file data entry (TS)

Initial client contact (JF)

Changing PM info (JF)

• 15-day check-ins (JF)

· Exit interviews (JF)

• Ensuring docs are received (GM)

· Wins/Success sheet completion (JF)

- · Processing mail (SH)
- · Coordinate appearances for attorneys (JF) · Calls to the sheriff for status updates (RP)
- · Editing and proofing documents (RP)
- · Coordinate Current Client Calls (RP)

Finalizing documents (RP)

· Signing documents (RA)

· Sending documents to clients (RP)

### **CASE MANAGER** JOHNNY

• # of Files processed in 30 days, 60 days, 90 days

· Calls to the court for status updates (RP)

· # Attorney Billable Hours

**VISIONARY** 

**OPERATIONS** 

Weekly Leadership Meeting (MIG)

MARIA

Signing Checks (EMK/MIG)

Lead Friday Team meeting (JF)

· Revenue to Goal

· Bi-yearly reviews (EMK)

Vacation approval (MIG)

· Hiring/Firing (EMK)

· Perform audits (LC)

· Culture (EK)

• Thinking time for the business (EK)

- # Paralegal Billable Hours
- % Reviews based on # of judgements
- · Update Airtable (JF)
- · Review Requests (JF)
- · Review Follow-up (JF)

## LAUREN

### • # Leads

· Input data into Airtable (MIG)

· Closed Case Info (TS)

Firm Financials (MIG)

· Producer Info (MIG)

Marketing (MS)

· UD Monthly Matters (TS)

UD Property Management (TS)

- % Social Engagement Rate
- # Followers
- # Impressions
- Powerpoint for Presentations (LC)
- · SBOAR Sponsorship & Ordering Food (LC)
- · Social media content (EMK)
- · Social media posts (Outlier)
- Website content (EMK)
- · Website management (Localista)
- · Arranging speaking engagements (LC)
- · Holiday gifts for referral partners (SH)

- Quarterly #'s for eviction to social media (LC)

# **MARKETING**

EA

LAUREN

· Past due receivables (LC)

· Quarterly Referral fees to be paid (LC)

· Quarterly Top referral sources (LC)

· Manage Rock performance (LC)

· Providing Provisors reports (LC)

· Scheduling appointments / meetings (LC)

• Providing P&L + Balance sheets for weekly meetings (LC)

• Provide Reports to COO (LC)

Personal Errands

- Quarterly thank you to referral partners (SH)
- Speaking Engagements (EMK)
- · Pens and Material to Eileen (SH)
- · Entering Marketing Spend in Lawmatics (MS)

**FINANCE EILEEN** 

velocity

- · \$ Total Income
- % Net Profit • ≤ 5% 90+ aging \$
- Entering AP into Smokeball (AS) Paying AP (Buying Time)
- · Payroll (Lorena)
- 401K contribution entry (Lorena)
- · Reconciling accounts (Silver Peaks)
- Yearly tax preparation (Gene Lim)
- · Generate monthly P&L (Silver Peaks) Reviewing Evergreen Trust (TS)
- · Invoice prep + send (TS)
- · Enter total amount billed into Airtable (TS) · Apply checks into Smokeball (MIG)
- · Deposit checks into Chase (MIG)
- · Uploading invoices to PM platform (AS)
- · Replenishing Evergreen Trust (TS)
- Entering total amount collected into Airtable (TS)
- · Collections (AS)

### **CIVIL DISPUTES** EILEEN

- · Consultations (EMK)
- Case strategy (RA)
- Executing discovery plan (RA)
- Reviewing motions (RA)
- Write opposition (RA) Entering all dates (RP)
- Entering deadlines (RP)
- · Court appearances (RA)

## Jury Trial Prep (RA)

- · Prepare witness list (RA)
- Formulating discovery plan (RA) Prepare jury instructions (RA)

· Prepare exhibit list (RA)

- · Prepare statement of case (RA) Prepare exhibit notebook (RP)
- · Meet and confer (RA)
- · File jury documents (RP)

## **BUSINESS**

### FII FFN

- · Consultations (EMK)
- · Gather information (MS) · Prepare operating agreement (CA)
- · Prepare SOS forms (CA)
- Obtain EIN (CA)
- File LLC documents with SOS (CA)
- · Update client (CA)

# **OTHER**

- Lease drafting (CA)
- Contract drafting (CA)
- Deed drafting (CA) PCOR drafting (CA)

- Sheriff package preparation (RP)
- Court appearances (RA) · Jury Trial Prep (RA)
- Prepare witness list (RA) Prepare jury instructions (RA) Prepare exhibit list (RA)
- Prepare statement of case (RA) Prepare exhibit notebook (RP)
- Meet and confer (RA) • File jury documents (RP)

# EILEEN

- · Consultations (EMK)
- Lease review (CA)
- Contract review (CA)
- · Submit deed package to recorder (RP)



# **Kendall Law**

# **Accountability Chart**

Updated: 1/7/2024

## **LEGEND**

- MS Marilyn
- · MIG Maria
- JF Johnny

**MARIA** 

· % Reviews based on # of closed cases

· Changing water in cooler (TS)

· Filing away judgements (RP)

· Year end clean up (MIG)

· Ordering supplies (SH)

· Yearly review of ins policies (MIG)

· Updating employment posters (MIG)

· Filing paper receipts and invoices (MIG)

· Organizing and throwing celebrations (LC)

· Monitoring and upkeep of passwords (LC)

· Check in / out boxes to deliver Interoffice Mail (TS)

· Enter Holidays and Birthdays in the calendar (LC)

· Taking inventory of supplies (SH)

· Stocking bathroom supplies (TS)

· Closing files and review request (TS)

· Filling printer paper trays (TS)

· Maintaining PM list (TS)

· Ice Machine (SH)

· Clean Fridge (SH)

· MCLE Tracking (SH)

· Maintain Team Roster (LC)

· Watering plants (TS)

· Taking out trash (TS)

- GM Gherabel
- IS Intake Specialist TS Tierra Sparks
- LC Lauren Cruz
- AS Armand
  - RA Responsible Attorney • RP - Responsible Paralegal

MARILYN

% Reviews based on # of consultation

· Answering phone calls (SH)

· Schedule consultations (IS)

· Consultation f/u calls (IS)

• F/u on signing letters (IS)

· Consultation reminder calls (IS)

· Preparing engagement letters (IS)

• F/u on consultation payment (IS)

· Maintaining addendums for PMs (IS)

• F/u on retainer payment (IS)

· New file data entry (IS)

· Review Requests (IS)

· Intake followup (IS)

· # Post-consult conversion rate

# Sales without consult

• # New Matters

- SH Shalita Hammell
- EMK- Eileen Kendall

## **VISIONARY**

**EILEEN** 

- · Thinking time for the business (EK)
- · Culture (EK)

## **OPERATIONS**

MARIA

- · Revenue to Goal
- · Weekly Leadership Meeting (MIG)
- · Signing Checks (EMK/MIG)
- · Lead Friday Team meeting (JF)
- · Bi-yearly reviews (EMK)
- Hiring/Firing (EMK)
- · Vacation approval (MIG)
- Perform audits (LC)
- · Input data into Airtable (MIG) · Closed Case Info (TS)
  - UD Property Management (TS)
  - · UD Monthly Matters (TS)
  - · Marketing (MS) · Firm Financials (MIG)
  - Producer Info (MIG)

**MARKETING** LAUREN

- % Social Engagement Rate
- # Followers · # Impressions

• # Leads

- · Powerpoint for Presentations (LC)
- · SBOAR Sponsorship & Ordering Food (LC)
- · Social media content (EMK)
- · Social media posts (Outlier)
- · Website content (EMK)
- · Website management (Localista)
- · Arranging speaking engagements (LC)
- · Quarterly thank you to referral partners (SH)
- · Holiday gifts for referral partners (SH)
- · Speaking Engagements (EMK)
- · Pens and Material to Eileen (SH)
- · Entering Marketing Spend in Lawmatics (MS)
- · Quarterly #'s for eviction to social media (LC)

### **CASE MANAGER JOHNNY**

- # of Files processed in 30 days, 60 days, 90 days
- # Attorney Billable Hours
- · # Paralegal Billable Hours
- · % Reviews based on # of judgements
  - · Update Airtable (JF)
  - · Review Requests (JF)
- Review Follow-up (JF)

- Formulating discovery plan (RA)
- · Executing discovery plan (RA)
- · Reviewing motions (RA)
- Write opposition (RA)
- · Entering deadlines (RP)
- · Court appearances (RA)
- · Jury Trial Prep (RA)

  - Prepare jury instructions (RA)

  - · Prepare statement of case (RA)
  - Prepare exhibit notebook (RP)
  - · Meet and confer (RA)
  - File jury documents (RP)

### **FINANCE** EILEEN

LAUREN

Quarterly Referral fees to be paid (LC)

• Quarterly Top referral sources (LC)

· Manage Rock performance (LC)

· Providing Provisors reports (LC)

· Scheduling appointments / meetings (LC)

• Providing P&L + Balance sheets for weekly meetings (LC)

• Provide Reports to COO (LC)

· Personal Errands

· Past due receivables (LC)

- \$ Total Income
- · % Net Profit • ≤ 5% 90+ aging \$
- Entering AP into Smokeball (AS)

velocity work.

- Paying AP (Buying Time)
- · Payroll (Lorena)
- 401K contribution entry (Lorena)
- Reconciling accounts (Silver Peaks)
- · Yearly tax preparation (Gene Lim)
- · Generate monthly P&L (Silver Peaks) · Reviewing Evergreen Trust (TS)
- · Invoice prep + send (TS)
- · Enter total amount billed into Airtable (TS)
- · Apply checks into Smokeball (MIG)
- · Deposit checks into Chase (MIG)
- · Uploading invoices to PM platform (AS)
- · Replenishing Evergreen Trust (TS)
- · Entering total amount collected into Airtable (TS)
- · Collections (AS)



**CLIENT SERVICES** 

FII FFN

· Fact gathering/litigation memo (RA)

· Coordinate appearances for attorneys (JF)

· Calls to the court for status updates (RP)

· Calls to the sheriff for status updates (RP)

· Sending documents to clients (RP)

· Coordinate Current Client Calls (RP)

· Editing and proofing documents (RP)

· # Unhappy client instances

• # Billable Attorney Hours

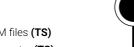
• # Billable paralegal hours

· Client updates (JF, RA, RP)

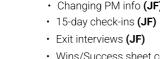
· Finalizing documents (RP)

· Signing documents (RA)

· Processing mail (SH)



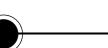
- · Opening PM files (TS)
- PM file data entry (TS)
- Ensuring docs are received (GM)
- · Changing PM info (JF)



- · Initial client contact (JF)
- · Wins/Success sheet completion (JF)



**REAL ESTATE** FII FFN



# **UNLAWFUL DETAINER**

- **EILEEN**
- · Consultations (EMK) · Case strategy (RA)
- · Prepare necessary Notices (RP) · Prepare Complaint package (RP)
- Review and approve all documents before
- going out (RA) · Obtain responsive pleading (RP)
- · Send client recommendation + cost (RA)
- Prepare motions, including MSJ (RP) Formulating discovery plan (RA)
- · Prepare discovery to be sent to client (RP) Prepare Opposition to Motions (RA)
- · Review and respond to discovery from Tenant (RA)
- · Confirm dates (RP)
- Entering dates in calendar (RP)
- · Entering deadlines (RP) · Default package preparation (RP)
- · Writ package preparation (RP) · Updating whiteboard with monthly #'s (RP)

- Sheriff package preparation (RP)
- · Court appearances (RA) · Jury Trial Prep (RA)
  - Prepare witness list (RA)
  - · Prepare jury instructions (RA)
  - · Prepare exhibit list (RA)
  - Prepare statement of case (RA)
  - · Prepare exhibit notebook (RP)
- - · Meet and confer (RA) File jury documents (RP)

## **OTHER EILEEN**

- Consultations (EMK)
- · Lease drafting (CA) · Lease review (CA)
- · Contract drafting (CA) · Contract review (CA)
- Deed drafting (CA)
- PCOR drafting (CA) · Submit deed package to recorder (RP)

## **CIVIL DISPUTES**

## **EILEEN**

- · Consultations (EMK)
- · Case strategy (RA)
- · Entering all dates (RP)
- - · Prepare witness list (RA)
  - · Prepare exhibit list (RA)

# **EILEEN**

- · Consultations (EMK)
- · Gather information (MS)
- · Prepare operating agreement (CA) • Prepare SOS forms (CA)
- · Obtain EIN (CA)
- · File LLC documents with SOS (CA)
- Update client (CA)

