

# Kendall Law

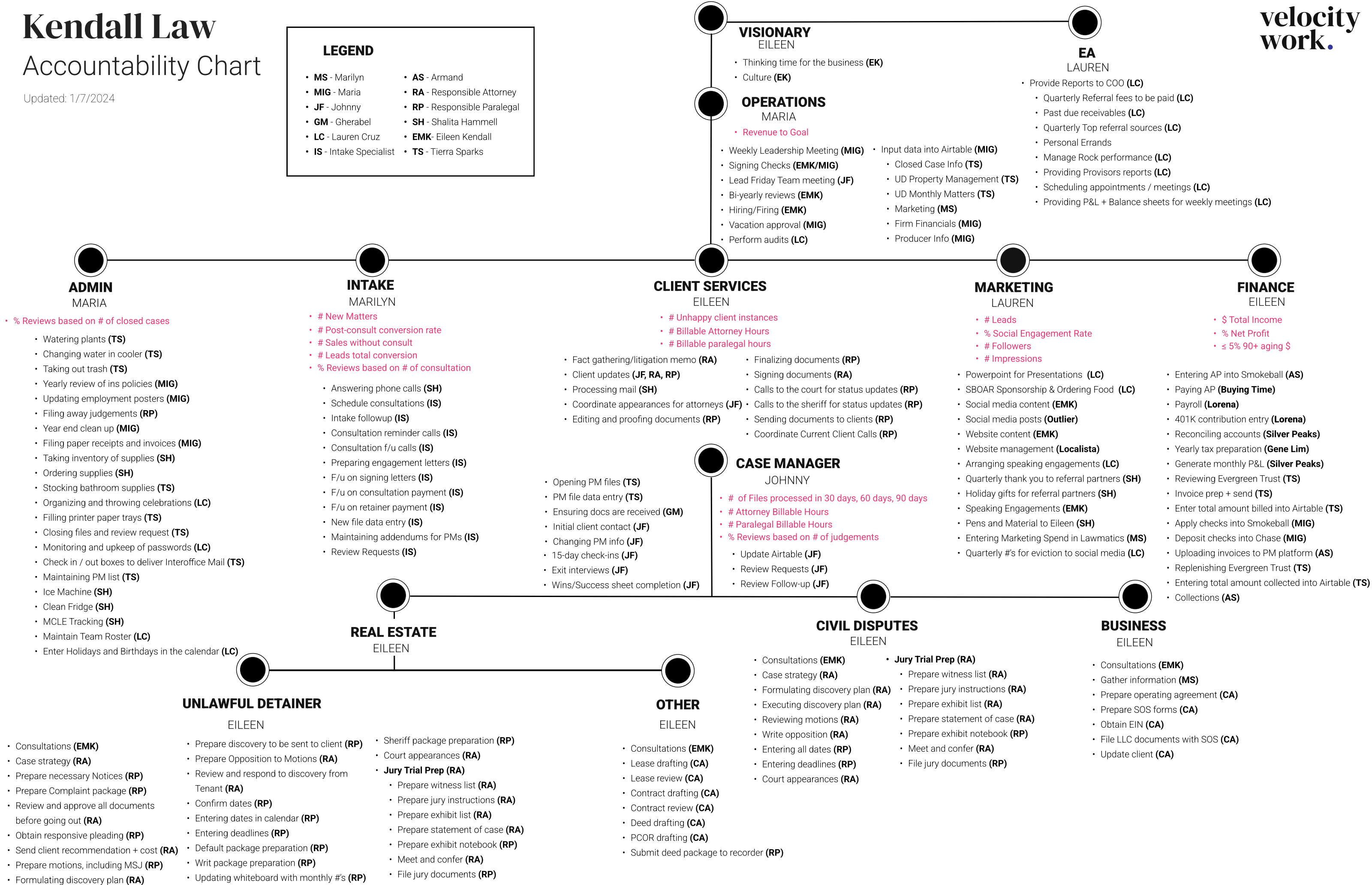
## Accountability Chart

Updated: 1/7/2024



**LEGEND**

- **MS** - Marilyn
- **MIG** - Maria
- **JF** - Johnny
- **GM** - Gherabel
- **LC** - Lauren Cruz
- **IS** - Intake Specialist
- **AS** - Armand
- **RA** - Responsible Attorney
- **RP** - Responsible Paralegal
- **SH** - Shalita Hammell
- **EMK** - Eileen Kendall
- **TS** - Tierra Sparks



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**VISIONARY**  
EILEEN

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

**EA**  
LAUREN

- Provide Reports to COO (**LC**)
  - Quarterly Referral fees to be paid (**LC**)
  - Past due receivables (**LC**)
  - Quarterly Top referral sources (**LC**)
- Personal Errands
- Manage Rock performance (**LC**)
- Providing Provisors reports (**LC**)
- Scheduling appointments / meetings (**LC**)
- Providing P&L + Balance sheets for weekly meetings (**LC**)

**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**)

**ADMIN**  
MARIA

- % Reviews based on # of closed cases
- Watering plants (**TS**)
- Changing water in cooler (**TS**)
- 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**)
- Maintain Team Roster (**LC**)
- Enter Holidays and Birthdays in the calendar (**LC**)

**INTAKE**  
MARILYN

- # New Matters
- # Post-consult conversion rate
- # Sales without consult
- # Leads total conversion
- % Reviews based on # of consultation
- Answering phone calls (**SH**)
- Schedule consultations (**IS**)
- 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**)
- New file data entry (**IS**)
- Maintaining addendums for PMs (**IS**)
- Review Requests (**IS**)

**CLIENT SERVICES**  
EILEEN

- # Unhappy client instances
- # Billable Attorney Hours
- # Billable paralegal hours
- Fact gathering/litigation memo (**RA**)
- Client updates (**JF, RA, RP**)
- Processing mail (**SH**)
- Coordinate appearances for attorneys (**JF**)
- Editing and proofing documents (**RP**)
- Finalizing documents (**RP**)
- Signing documents (**RA**)
- 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**)

**MARKETING**  
LAUREN

- # Leads
- % 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**)
- 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**)

**FINANCE**  
EILEEN

- \$ 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**)

**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**)

**REAL ESTATE**  
EILEEN

- Opening PM files (**TS**)
- PM file data entry (**TS**)
- Ensuring docs are received (**GM**)
- Initial client contact (**JF**)
- Changing PM info (**JF**)
- 15-day check-ins (**JF**)
- Exit interviews (**JF**)
- Wins/Success sheet completion (**JF**)

**CIVIL DISPUTES**  
EILEEN

- Consultations (**EMK**)
- Case strategy (**RA**)
- Formulating discovery plan (**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**)
  - 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**  
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**)

**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**)

**OTHER**  
EILEEN

- 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**)
- 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**)