Indiana Estate and Elder Law

Accountability Chart

Updated: 3/2025

velocity work.

LEADERSHIP TEAM

STRATEGIST
JENNY

- Strategy (Justin)
- Culture (Jenny)
- Mentorship (Jenny)

MARKETING
JENNY

 # Initial Contacts
 # Qualified Leads

- **Employee Quarterly Reviews**
- Managing PPs (Kayla)
- Event Coordination (Kayla)
- Retail Strategy and Communication (Kayla)
- Content Creation (Kayla)
- PR (Kayla)
- Website Management (Kayla)
- Social Media Management (Kayla)
- SEO (Kayla)
- Charitable org. collaboration (Kayla)
- ROI (Cara)
- Brand Management (Kayla)

CLIENT SERVICES
TRISA

% Scheduled
% Showed

- **Employee Quarterly Reviews**
- Intake (Kinsey)
  - Answering Phones (Kinsey)
  - Prospect Enrollment (Kinsey)
  - Online Contact Forms (Sarah)
- Calendar Management (Trisa)
- Template and Form Inventory (Kinsey)
- Physical File Processing (Alexxis)
- Digital File Processing (Lisa W.)
- Follow up (Sarah)
- Client Acknowledgment (Kinsey)
- Collect Payments (Kinsey)
- Mail Processing (Kinsey)
- Deposits (Kinsey)
- Binder Process (Jake)
- Kenect Monitoring (Lisa W.)

LEGAL/TECHNICAL
RACHAEL

% Closing Rate
$ Average Fee

- **Employee Quarterly Reviews**

OPS
TRISA

- **Employee Quarterly Reviews**
- Supply Ordering/Inventory (Sarah)
- Stocking (Jake)
- Vendor Liaison (Trisa)
  - Cleaners (Trisa)
  - Phone (Trisa)
  - Printer (Trisa)
  - IT (Trisa)
  - Compliance (Trisa)
  - Security (ADT) (Trisa)
- Internal Acknowledgments (Trisa)
- Firm KPI Entry (Trisa)
- Firm KPI Management (Trisa)
- Project Management (Trisa)

FINANCE
JUSTIN

$ AR 90+ Days

- **Employee Quarterly Reviews**
- Accounts Receivable (Justin)
- Accounts Payable (Justin)
- Payroll (Buying Time)
- 401k Contributions (Buying Time)
- Accounting Data Entry (Buying Time)
- CPA Relationship Management (Justin)
- Airtable Entry (Justin)
- Account Reconciliation (Buying Time)

HR
JUSTIN

- **Department Head Reviews**
- **Employee Annual Reviews**
- Hiring (Justin)
- Onboarding (Trisa)
- Offboarding (Justin)
- Benefit Management (Justin)
- PTO Tracking (Trisa)
- Handbook Compliance (Justin)

EP
RACHAEL

- Initial Meeting (AA)
- Handoff to Client Services (AA)
- Design Meeting (AA)
- Drafting Documents (Valerie)
- Editing Drafts (AA)
- Signing Meeting (AA)
- Funding (if applicable) (Heather)

ADMIN
RACHAEL

$ Overdue

PROBATE
SAM T.

- Initial Meeting (Sam T.)
- File Processing (Chelsea)
- Closing File (Chelsea)

TRUST ADMINISTRATION
SAM T.

- Initial Meeting (Sam T.)
- File Processing (Chelsea)
- Closing File (Chelsea)

ELDER LAW
RACHAEL

$ Overdue

MEDICAID
LISA B.

- Initial Meeting (Lisa)
- File Processing (Lisa)
- Closing File (Lisa)

GUARDIANSHIP
CHELSEA

- Initial Meeting (Attorney AA)
- File Processing (Chelsea)
- Hearing (AA)
- Closing File (Chelsea)

MAINTENANCE
SAM T.

 # Retained
% Growth (in dollars)
 # Opt Outs
 # Opt Ins
 # Total Participants

- Maintenance Spreadsheet Management (Sam T.)
- Maintenance Billing (Buying Time)
- Event Coordination (Sam T.)
- Maintenance Client Communication (Sam T.)
  - Mailings (Sam T.)
  - Follow up (Sam T.)
  - Enrollment follow ups (Sam T.)
  - Program Utilization (Sam T.)