# Jeff Lewis Law Accountability Chart

Updated: 3/2025



**OPERATIONS** 

velocity work.

- Client selection (Jeff)
- Case strategy (Jeff)
- Culture (Jeff)
- 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 (Cassidy)
- Expense Entries (Jason)

#### Finance

- Bank Deposits (Cassidy)
- 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 (Cassidy + Jammie)

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

#### **MARKETING**

#### **JEFF**

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

#### 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 (Cassidy)
- Ask for Testimonial (Cassidy)
- Writs
  - Calendaring deadlines (Cassidy)
  - Documents from Trial Counsel (Cassidy)
  - 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 (Cassidy)
  - Ask for Testimonial (Cassidy)

## **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)
  - Tech issues (Jason) Jury instructions (Jeff)
- Opening statement (Jeff) Post-trial (Jeff)

MILs (Jeff)

- Post-trial motions (Jeff) Cost and fee motions (Jeff)
- Enforcement (Jeff)

Close file (Cassidy)

Perfecting appeal (Jason)

Ask for Testimonial (Cassidy)

# **SLAPPS**

**JEFF** 

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



- **JEFF**
- 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 (Cassidy)
- Ask for Testimonial (Cassidy)