Kendall Law

Accountability Chart

Updated: 3/19/2025

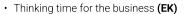
LEGEND

- MS Marilvn
- **JF** Johnny
- RA Responsible Attorney
- RP Responsible Paralegal • GM - Gherabel
- LC Lauren Cruz
- SH Shalita Hammell
- IS Intake Specialist
 - EMK- Eileen Kendall

· AS - Armand

• TS - Tierra Sparks

VISIONARY



· Culture (EK)

OPERATIONS

FII FFN

- · Revenue to Goal
- Weekly Leadership Meeting (EMK)
 Input data into Airtable (EMK)
- · Signing Checks (EMK)
- Lead Friday Team meeting (JF)
- · Bi-yearly reviews (EMK)
- Hiring/Firing (EMK)

· Perform audits (LC)

- · Vacation approval (EMK)
- · Closed Case Info (TS)
- UD Property Management (TS)
- · UD Monthly Matters (TS)
- · Marketing (MS) • Firm Financials (Buying Time)
- · Producer Info (Buying Time)

LAUREN

velocity

• 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)



ADMIN EILEEN

• % Reviews based on # of closed cases

- Watering plants (TS)
- · Changing water in cooler (TS)
- Taking out trash (TS)
- Yearly review of ins policies (LC)
- Updating employment posters (SH)
- Filing away judgements (RP)
- Year end clean up (SH)
- Filing paper receipts and invoices (SH)
- 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)

· 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)

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

- # New Matters
- # Post-consult conversion rate

INTAKE

MARILYN

- # 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)

FII FFN

- 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 Attornev Hours
- # Billable paralegal hours
- · Fact gathering/litigation memo (RA) · Client updates (JF, RA, RP)
- · Processing mail (SH)

· 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)

- · Editing and proofing documents (RP)
- Finalizing documents (RP)
- · Signing documents (RA) · Calls to the court for status updates (RP)
- · Coordinate appearances for attorneys (JF) · Calls to the sheriff for status updates (RP)
 - · Sending documents to clients (RP)
 - · Coordinate Current Client Calls (RP)



- 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)

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)

· \$ Total Income

FINANCE

EILEEN

- % 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 (TS)
- Sending invoices (AS)
- · Enter total amount billed into Airtable (TS) · Apply checks into Smokeball (TS)
- Deposit checks into Chase (EMK)
- · Uploading invoices to PM platform (AS)
- · Replenishing Evergreen Trust (AS)
- · Entering total amount collected into Airtable (TS) · Collections (AS)

BUSINESS Writing checks (SH)

FII FFN

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



UNLAWFUL DETAINER FII FFN

- Prepare discovery to be sent to client (RP)
- Tenant (RA)
- Entering dates in calendar (RP)
- · Entering deadlines (RP)
- Default package preparation (RP)

- Prepare Opposition to Motions (RA)
- Review and respond to discovery from
- · Confirm dates (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)

EILEEN

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

- · Consultations (EMK)

OTHER

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



- · Prepare witness list (RA) Case strategy (RA)
- Executing discovery plan (RA) Reviewing motions (RA)
- Entering all dates (RP) Entering deadlines (RP) · Court appearances (RA)

Write opposition (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)



- - · Gather information (MS)

Kendall Law

Accountability Chart

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VISIONARY

EILEEN

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

OPERATIONS

EILEEN

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- Weekly Leadership Meeting (EMK)
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• # Leads

• # Impressions

• % Social Engagement Rate

· Powerpoint for Presentations (LC)

Social media content (EMK)

Social media posts (Outlier)

• Website management (Localista)

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Holiday gifts for referral partners (SH)

Quarterly thank you to referral partners (SH)

· Website content (EMK)

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LAUREN

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- · Writing checks (SH)

LEGEND

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- · AS Armand
- JF Johnny
 - RA Responsible Attorney • RP - Responsible Paralegal
- GM Gherabel

EILEEN

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MARILYN

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CLIENT SERVICES

FILEEN

- · 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)

Speaking Engagements (EMK)

- · Pens and Material to Eileen (SH)

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CASE MANAGER

JOHNNY

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- · Write opposition (RA)
- · Entering deadlines (RP)
- Court appearances (RA)
- · Jury Trial Prep (RA)
- · Prepare exhibit list (RA)
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- File jury documents (RP)

EILEEN

REAL ESTATE



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)
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 - · 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

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