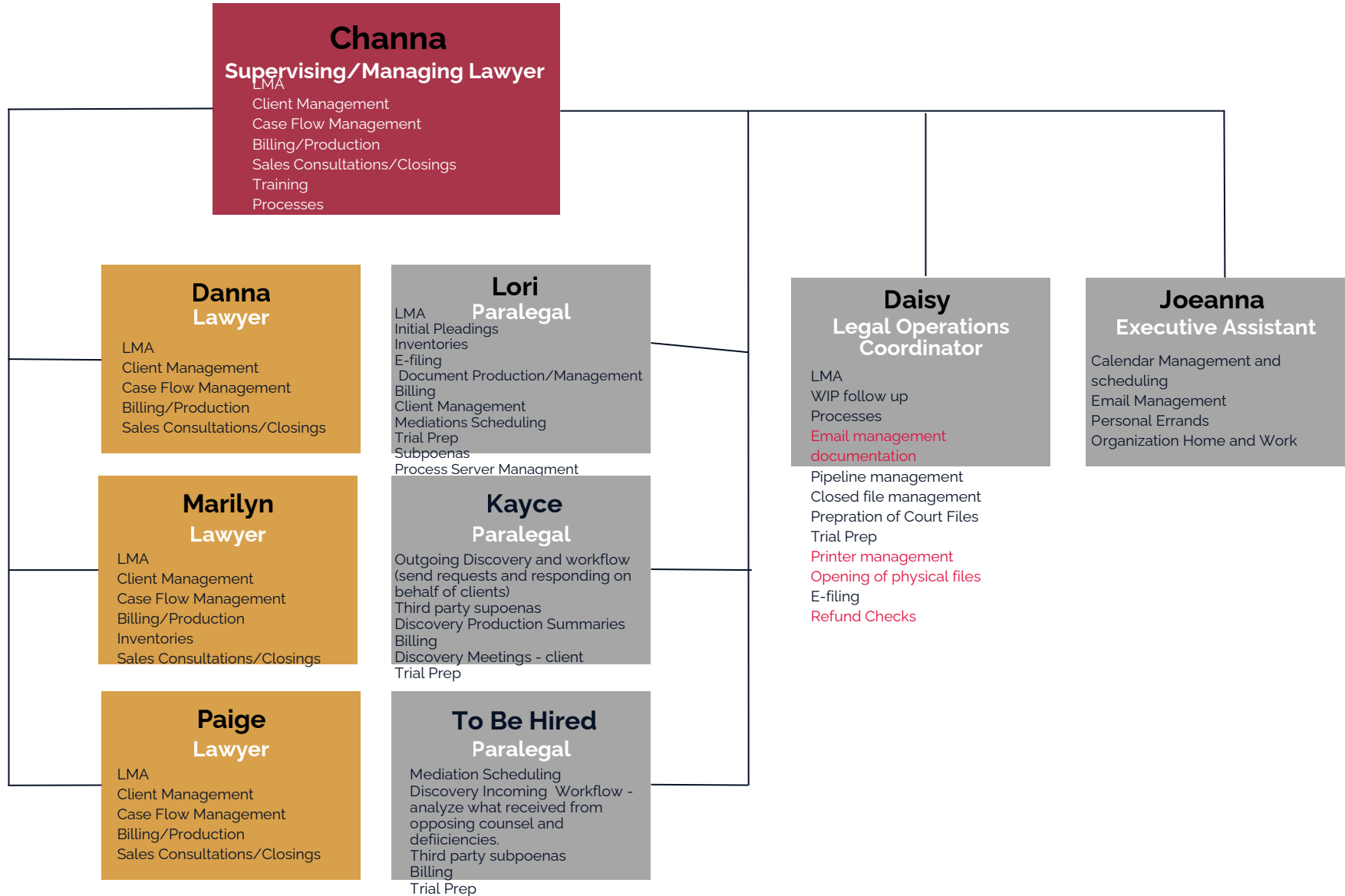


Operations



Finance



Admin & Physical Plant

Stephen
Director of
Administration

LMA - Culture
IT General Informatics
HR, Benefit/Payroll Gusto,
Recruiting/Hiring
Billing Metrics and Tracking
Vendor Management and Hiring
HR + PSP/SOP -non-legal
Physical Plant

Angel
Assistant

Generate Reports
Email documentation management for
Channa
Travel planning/scheduling

Marketing.

**Stephen
Marketing**

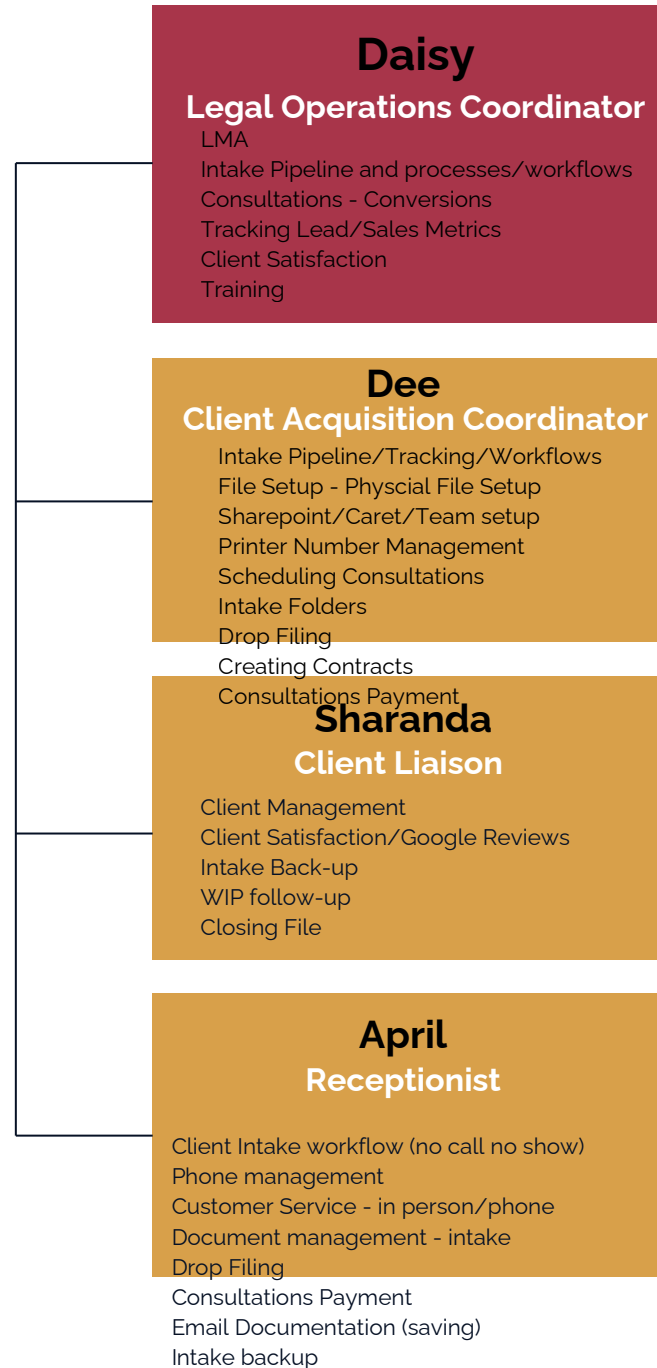
LMA
ROI (Metrics)
Marketing Processes
Vendor ROI & Relationships
Google Reviews
Community Events

Legends

Awareness & Lead Gen

:

Sales



**Supervising/Managing
Lawyer
Megan**

LMA
Client Management
Case Flow Management
Billing/Production
Sales Consultations/Closings

**Lawyer
Danna**

LMA
Client Management
Case Flow Management
Billing/Production
Sales Consultations/Closings

**Lawyer
Megan**

LMA
Client Management
Case Flow Management
Billing/Production
Sales Consultations/Closings

Lawyer

**Litigation
Paralegal
Lori**

Initial Pleadings
Document
Production/Management -
pleadings & orders.
Billing
Client Management
Trial Production

**Discovery
Paralegal
Kim**

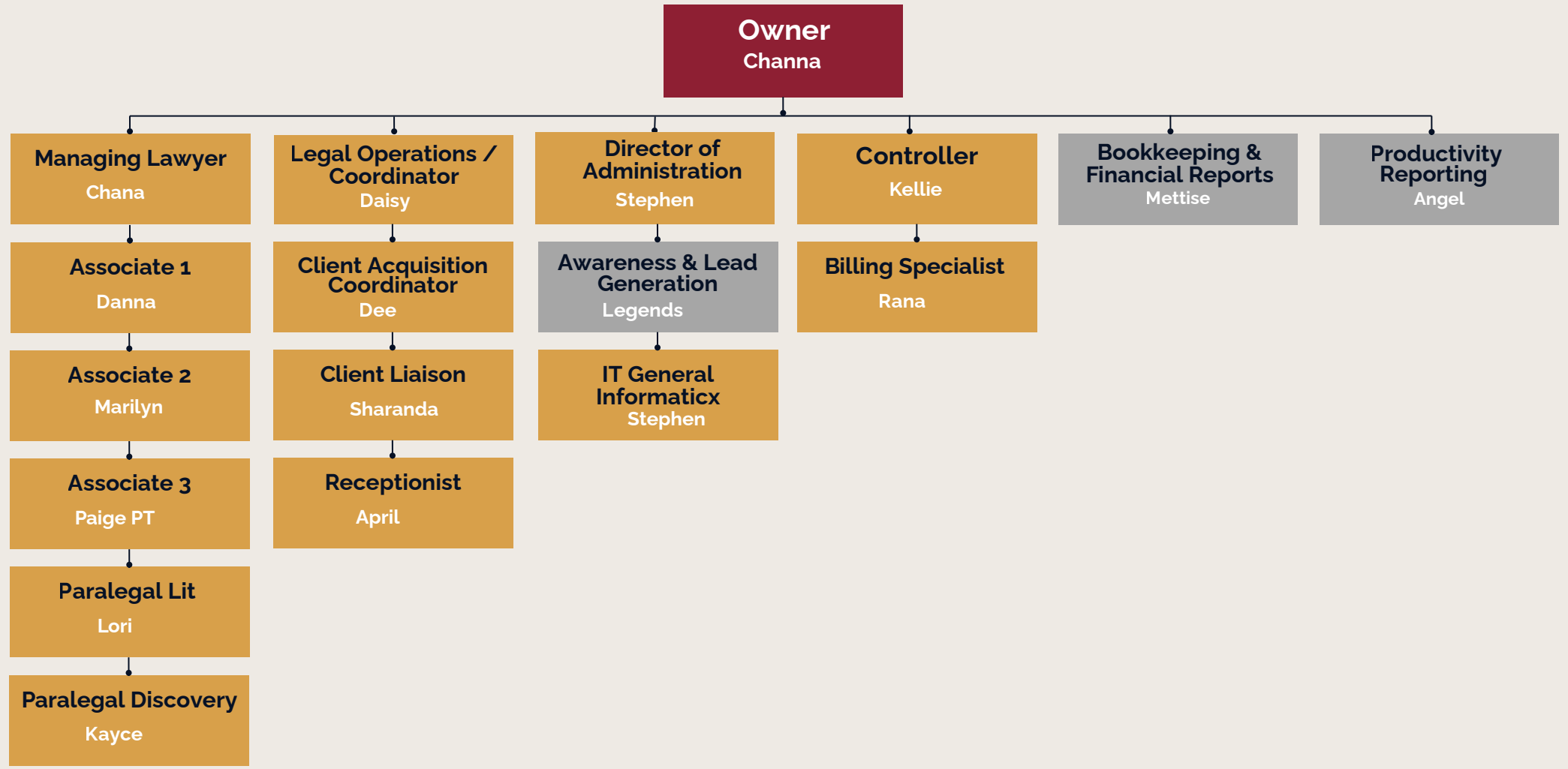
Case Management -Incoming
Discovery and workflow
Case Management-Outgoing
Discovery and workflow
Inventories
Billing

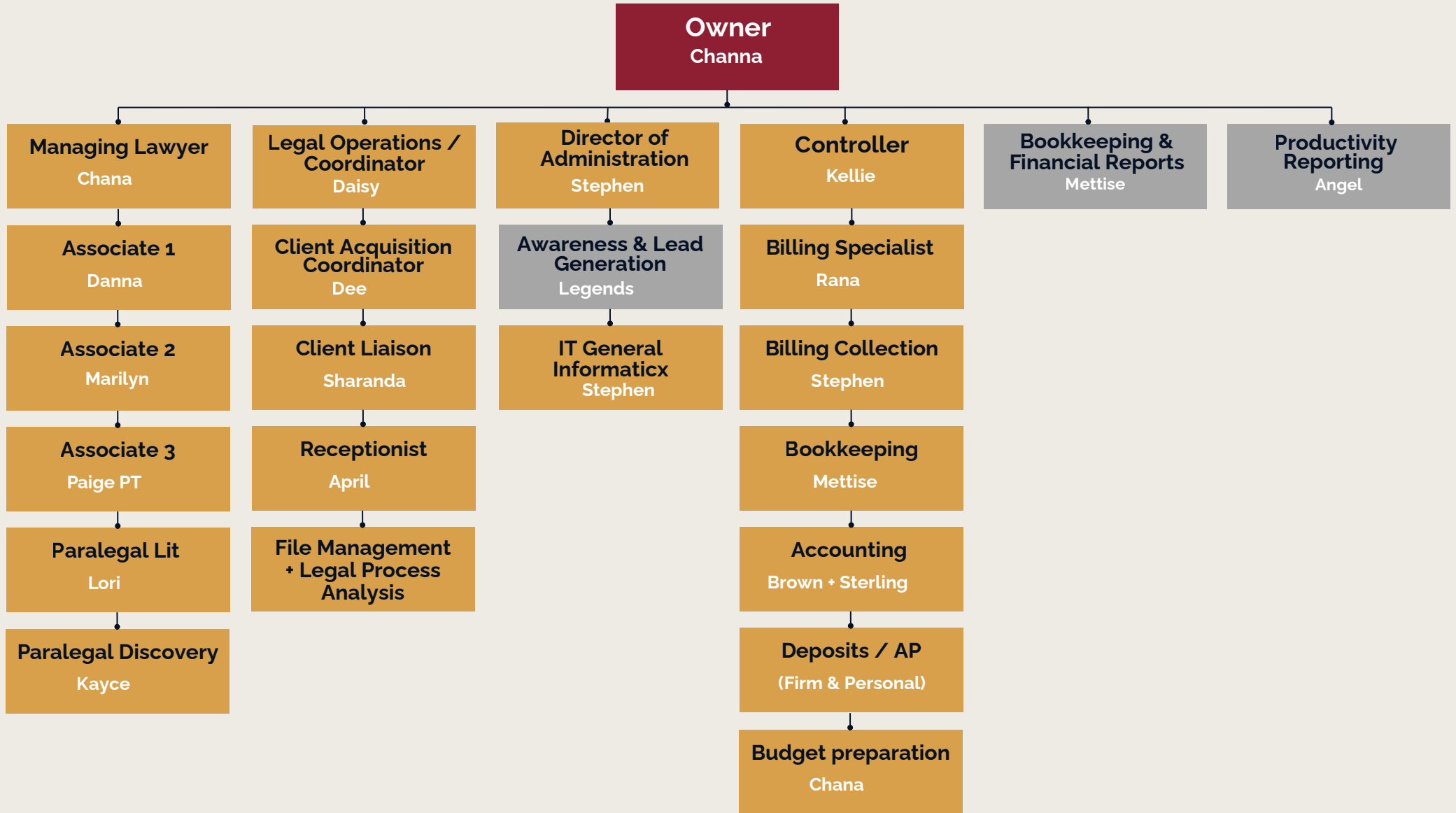
**Scheduling
Paralegal
Kim**

Case Management
Scheduling Mediations &
Preparatory Meetings.
Billing
Client Management

**Operations
Paralegal
Lauren**

Workflows and PSPs
Pipeline Management
Document Production
WIP follow up
Drop filing
WIP
Closing File Management
Executive Assistant





Integrator
Channa
LMA
Vision - Growth
Culture
Legal Production Process
Business Plan - Sales and Marketing

Marketing
Stephen
LMA
ROI (Metrics)
Marketing Processes
Podcast Development/ Process
Vendor ROI & Relationships

Sales
Stephen
LMA
Intake Pipeline
Consultations - Conversions
Tracking Lead/Sales Metrics
Client Satisfaction

Operations
Stephen
LMA - Culture
Billing Metrics and Tracking
Vendor Management
HR (includes payroll)
HR + PSP/SOP -non-legal
Physical Plant

Finance
Kellie
LMA
AR & AP
Budget metrics
Data Management - Taxes
Financial Management

Managing Attorney -
Legal Operations
Megan
LMA Client Management Case
Flow Management
Billing/Production Sales
Consultations/Closings

Intake Specialist
Mollie
Intake Pipeline
File Set-up
Consultations - Conversions
Client Satisfaction

**Receptionist/
Intake Admin**
Sarah
Client Intake pipeline
Phone management
Customer Service - in person

Billing Specialist
Rana
Collections
Billing Management
Accounts Receivable
Client Satisfaction

**See team info on
the next page.**
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