

Accountability

The goal of this exercise is to be very clear on who is accountable for each role in your firm. It is not necessarily about reporting or management structures at this stage.

○ **STEP 1: THINK ABOUT ALL THE ROLES/RESPONSIBILITIES WITHIN YOUR FIRM (WE'LL HELP GET YOU STARTED)**

First, every firm needs a visionary. This creative entrepreneur generates new big ideas, challenges the firm, and solves big problems with new ways of thinking. Often, this person is not as effective with day-to-day management or details.

Who is your firm's visionary?

Next, you need the manager or integrator. This person manages the firm's people and processes. They make sure the trains run on time and every area of the firm functions in harmony. They hold people accountable and focus on generating great results. They can take the visionary's plan and make it happen.

Who is your firm's integrator?

The day-to-day firm functions fall into one of three basic buckets: Marketing/Business Development; Delivering client services; and Finance/Operations. ONE person is responsible for each area. You could have other roles that fall under these five primary roles. For now, keep things streamlined and be 100% clear on who is responsible for each major area and what is expected of them.

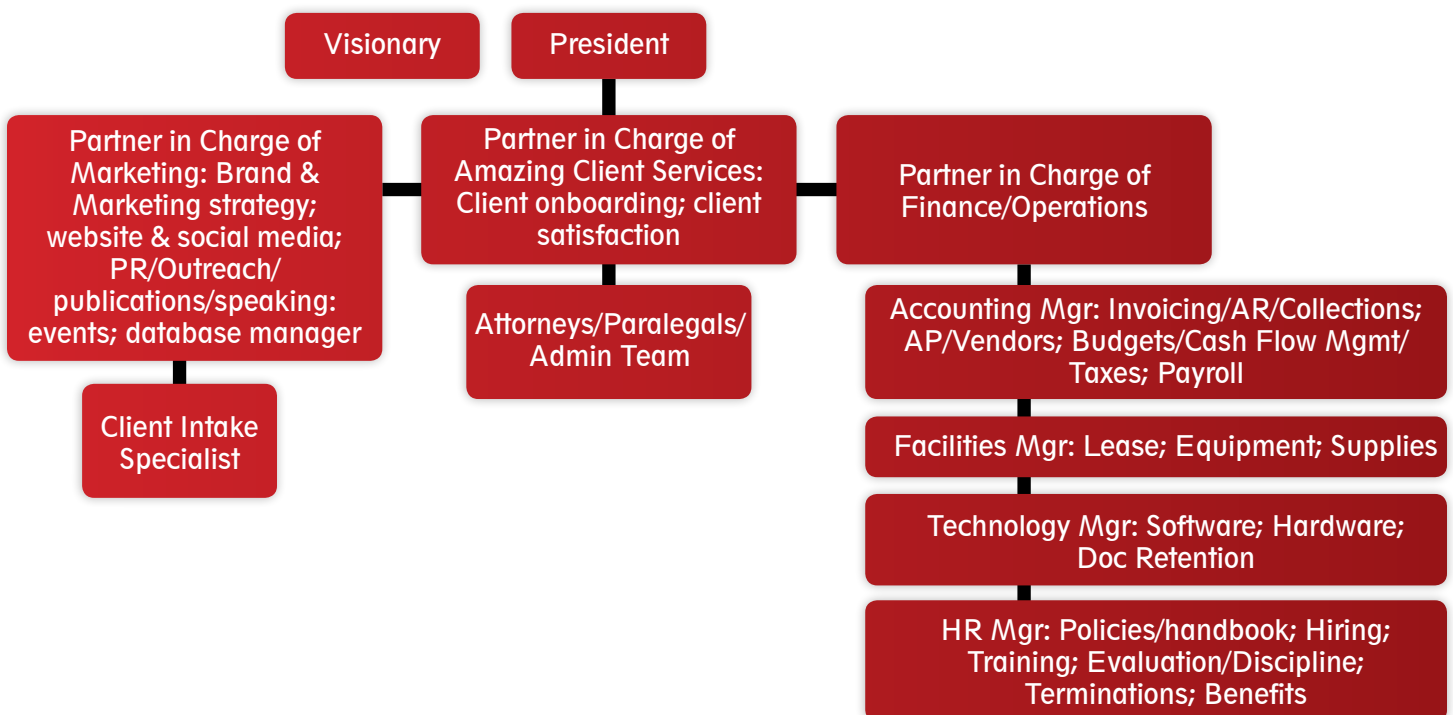


Who is accountable for your firm's sales/marketing?
What are their 5 major roles?

Who is accountable for your firm's delivery of amazing client services?
What are their 5 major roles?

Who is accountable for your firm's finance and operations?
What are their 5 major roles?

Another way to think about your accountability chart:



Here are potential responsibilities for each role:

LEADERSHIP:

- Vision/strategy
- New ideas
- Creative problem-solving
- “Face” of the firm
- Strategic Relationships

INTEGRATOR/PRESIDENT:

- Leadership/Management
- Driving business plan forward
- Special projects
- Managing ongoing relationships within an outside firm

MARKETING/BUSINESS DEV:

- Brand/marketing strategy
- Implementing marketing process
- Content - publications, blog
- PR - speaking, events
- Client engagement process
- Website/social media

CLIENT SERVICES:

- Client onboarding
- Client communications
- Receptionist
- Legal assistants
- Paralegals
- Investigators
- Attorneys
- Virtual support staff

FINANCIAL:

- Budgeting/forecasting
- Invoicing/AR/collections
- Accounts payable
- Bookkeeping/tax planning
- Payroll
- Cash flow control
- Banking/line of credit
- Trust accounting
- Insurance

HUMAN RESOURCES:

- Policies/handbook
- Hiring
- Training
- Evaluation
- Discipline/terminations
- Benefits

FACILITIES

MANAGER:

- Lease/office space;
- Office supplies
- Office equipment
- Managing vendors
- Housekeeping
- Technology

List the person responsible for each area of the firm. Identify the main responsibilities for each role (no more than 5).

YOUR FIRM:

VISIONARY:

Responsibilities:

INTEGRATOR:

Responsibilities:

MARKETING/BUS DEV:

Responsibilities:

DELIVERING CLIENT SERV.:

Responsibilities:

FINANCE/OPERATIONS:

Responsibilities: