



# NEW EMPLOYEE ONBOARDING



# New Employee Onboarding

## Key Performance Indicators

1. Clients are given proactive updates in the status of their work and provided with copies of all work product that is sent out from the office on their matters.
2. Communication is responded to within one business day of receipt.
3. Deadlines, calendaring and email are maintained within 90% accuracy.
4. Tasks are completed with 90% accuracy.
5. Work product is completed with 90% accuracy.
6. If you are a producer, you are hitting your production numbers monthly with 90% accuracy.

## Overall Expectations

- Attention to detail
- Proactivity
- Utilizing resources
- Executing with excellence
- Perfect attendance
- Timeliness
- Proper timekeeping
- Proper organization of files in SmokeBall, including naming documents, keeping memos up to date and folders.

## Daily Huddle

- By 10 am every day on Communicate
- One positive thing, three things you will accomplish that day, did you accomplish the three things from prior day, barriers, if any.

## Friday Meetings

- 3 pm every Friday
- We review the calendar
- Education Moment
- Bring
  - Be prepared with any necessary updates
  - Progress towards goals
  - Metric updates
  - Issues, concerns, or questions to be addressed

## **Equipment and Tools**

Computer  
Phone  
Scanner

## **Software & Programs**

Lawmatics (intake, closing/opening files, reports)  
Smokeball (case management, time tracking, emails, tasks, communication)  
Office 365 (email, calendar, shared drive, resources, surveys, Word, Excel, Powerpoint)  
Zoom (Meetings)  
Adobe (PDFs)  
Airtable (Eviction File Tracking)  
Loom (Videos)  
TextExpander (shortcuts for documents)  
Westlaw (legal research)  
Kenect (text messaging/reviews)  
Infotrack (legal filings)  
CoCounsel (legal AI)

## **Training**

Loom Videos  
Playbooks  
Policies and Procedures



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