THE RESPONSIBILITY MAPKIT:

A MANAGING PARTNER'S OWNERSHIP AUDIT

Managing Partner Preface Letter

To the Managing Partner,

The purpose of the MapKit is to act as an ownership audit.

Inside most firms, responsibility is not intentionally assigned but absorbed. It flows toward urgency, toward visibility, and most predictably, upward toward you.

Over time, this absorption feels normal, responsible, and necessary.

But unnamed ownership creates structural gravity. And structural gravity always pulls accountability back to the most visible authority in the room.

This MapKit is designed to interrupt that pull.

As you move through each stage of the client lifecycle, do not choose owners based on convenience, familiarity, or short-term relief. Choose based on durability.

Ask yourself:

Will this hold under pressure?
Will this scale under growth?
Will this still function when urgency appears?

You are not naming who can handle it today.
You are naming what will hold tomorrow.

Take your time completing this audit. Precision matters more than speed.

— Legacy

How to Use This MapKit

For each workflow:

- Name the Trigger
- Name the Owner (Accountable)
- Name the Support (if applicable)
- Name the Verification Point
- Name the Escalation Path

If you hesitate to name ownership, then take a second. That hesitation is structural data.

Lead Intake & Pre-Engagement

Purpose:

To name who stabilizes a matter before it becomes billable and to prevent intake from becoming personality-driven.

1. Initial Inquiry Received

Trigger (how does inquiry enter the firm?):

Owner (Accountable):

Support (Who assists, if applicable?):

Verification (How is the receipt confirmed?):

Escalation (If response is delayed or unclear):

- ☐ Inquiry handling is system-routed
- ☐ Inquiry handling depends on availability

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2. Conflict Check

Trigger (What initiates the check?):

Owner (Accountable):

Support:

Verification (How is clearance documented?):

Escalation (If conflict risk appears):

- ☐ Conflict review is documented
- ☐ Conflict review is informal

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3. Consultation Scheduled

Trigger:

Owner (Accountable):

Support:

Verification (Calendar confirmation/system log):

Escalation (If scheduling delays occur):

- ☐ Scheduling is structured
- ☐ Scheduling is reactive

4. Engagement Agreement Sent

Trigger:

Owner (Accountable):

Support:

Verification (How is sending confirmed?):

Escalation (If not returned):

- ☐ Agreement workflow is written
- ☐ Agreement workflow relies on follow-up memory

5. Agreement & Questionnaire Returned

Trigger (What confirms activation readiness?):

Owner (Accountable):

Support:

Verification (How is completeness confirmed?):

Escalation (If incomplete or delayed):

- ☐ Intake completion is system-confirmed
- ☐ Intake completion depends on manual review

Section Reflection I

Intake reveals future gravity.

1. Are you assigning ownership based on who currently absorbs this task? Or who should structurally own it long term?

2. If this role holder left tomorrow, would the system still hold?

- ☐ Yes
- ☐ No
- ☐ Unsure

3. Write one sentence:

Where am I choosing convenience over durability?

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Matter Activation

Purpose:

To name who stabilizes a matter at the moment it becomes real.

6. File Opened & Docket Created

Trigger Event (what officially activates the file?):

Who opens the file? (Name or title)

Who creates the docket/calendar entry?

Where is this documented? (Software/system name)

Completion Standard (how do you know this step is done?):

- ☐ This step is written in a firm procedure
- ☐ This step relies on habit or memory

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7. Strategy Meeting Conducted

When must this occur? (Timeframe after activation)

Who schedules it?

Who leads it?

Who documents outcomes and next steps?

Where are strategy decisions stored?

- ☐ Clear documentation exists
- ☐ Decisions live primarily in conversation

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8. Initial Deadlines Calendarized

Who identifies key deadlines?

Who inputs them into the system?

Who verifies accuracy?

Is there a secondary review?

- ☐ Yes
- ☐ No

What confirms completion?

Section Reflection II

This is not about speed but durability.

1. Does activation depend more on attorney memory or administrative structure?

- ☐ Memory
- ☐ Structure
- ☐ Unsure

2. If urgency increased by 30% next quarter, would this stage fracture?

- ☐ Yes
- ☐ No
- ☐ It already does

3. Write one structural vulnerability you observe:

Active Matter Management

Purpose:

To name who carries the matter while it is in motion, not at launch, not at close, but in the pressure of daily execution.

9. Ongoing Client Communication

Primary Communication Owner (name or title):

What triggers communication? (Milestone, deadline, client inquiry, etc.)

Minimum communication standard (frequency or event-based):

Where is communication logged? (CRM / case system/email only)

If the client escalates concerns, who absorbs it first?

- ☐ Communication is system-triggered
- ☐ Communication is reaction-based

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10. Task Delegation

(Complete this for how tasks move during an active matter.)

Owner (Accountable — ultimately answerable):

Executor (Responsible — performs the task):

Verification (Who confirms completion?):

Escalation Path (If delayed or incorrect):

Is this delegation structure written somewhere formally?

- ☐ Yes
- ☐ No

11. Deadline Monitoring

Who reviews upcoming deadlines weekly?

How far in advance are deadlines reviewed?

Who confirms deadlines were calendared correctly?

If a deadline is missed or nearly missed, who is notified first?

- ☐ Monitoring is proactive (scheduled review)
- ☐ Monitoring is triggered by urgency

Section Reflection III

This is where ownership either holds or climbs.

1. Where does accountability slide upward under pressure?

2. Are you consciously choosing owners or defaulting to authority?

- ☐ Conscious choice
- ☐ Default to authority
- ☐ Depends on workload

3. If the managing partner stepped out for 30 days, what would break first?

Billing & Financial Oversight

Purpose:

To name who protects revenue timing and ensure financial control does not depend on one vigilant personality.

12. Time Entry Review

Who reviews time entries before invoicing? (Name or title)

Review frequency:

- ☐ Weekly
- ☐ Bi-weekly
- ☐ Monthly
- ☐ Inconsistent

What is being reviewed? (Accuracy, narrative clarity, billable codes, etc.)

What triggers correction if entries are missing or unclear?

Is this review documented in the procedure?

- ☐ Yes
- ☐ No

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13. Invoice Release

Who prepares the invoice draft?

Who approves the invoice for release?

Is approval required before sending?

- ☐ Always
- ☐ Sometimes
- ☐ No formal approval

How are invoices delivered? (System / manual / hybrid)

What confirms release? (System log, confirmation email, etc.)

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14. Accounts Receivable Follow-Up

Who monitors outstanding invoices?

Review cadence:

- ☐ Weekly
- ☐ Bi-weekly
- ☐ Monthly
- ☐ Only when flagged

When does follow-up begin? (Days past due)

Who performs follow-up communication?

If payment stalls, who escalates and to whom?

- ☐ AR follow-up is scheduled
- ☐ AR follow-up is reaction-based

Section Reflection IV

Revenue exposes structure.

1. Is the financial oversight system-driven or personality-driven?

- ☐ System-driven
- ☐ Personality-driven
- ☐ Hybrid

2. If the most detail-oriented person left, would revenue timing shift?

- ☐ Yes
- ☐ No
- ☐ Unsure

3. What structural reinforcement is missing here?

Post-Matter Closure & Ongoing Relationship Ownership

Purpose of This Section:

To name who owns the relationship after legal work concludes and ensure responsibility does not dissolve once revenue is collected.

15. Final Deliverables Sent

What officially marks the matter complete?

Who prepares final deliverables?

Who verifies completeness and accuracy before sending?

How are deliverables transmitted? (Portal/email / certified mail / other)

What confirms receipt?

☐ Completion is system-confirmed
☐ Completion relies on an assumption

16. File Closed & Archived

Who authorizes file closure?

Who executes the archival procedure?

Where is the file stored? (System / physical / hybrid)

Is a closing checklist used?

☐ Yes
☐ No

If compliance requirements apply, who verifies them?

17. Post-Matter Communication

Who owns follow-up communication after closure?

When does follow-up occur? (Timeframe)

What is the purpose of follow-up? (Feedback/referral/check-in / future planning)

Where is ongoing relationship ownership documented?

If that person leaves the firm, who inherits the relationship?

- ☐ Ongoing ownership is named
- ☐ Ongoing ownership defaults upward

Section Reflection V

Post-matter ownership reveals long-term intent.

1. When you named post-matter ownership, did you choose the person who is easiest to assign… or the structure that will still hold under growth?

2. If growth exposed this system tomorrow, would it reinforce your leadership or reroute responsibility back to you?

- ☐ Reinforce
- ☐ Reroute
- ☐ Unsure

Final Structural Integrity Review Page

Purpose:
To review the full client lifecycle and assess whether ownership is stable or silently reverting upward.

Structural Checklist

Review your completed sections before checking each item.

- ☐ Ownership is distributed across roles, not concentrated in one person
- ☐ No single name appears as Owner (Accountable) in more than 40% of workflows
- ☐ Escalation paths are defined and do not default automatically to the Managing Partner
- ☐ Verification steps are system-confirmed (logged, reviewed, documented), not memory-confirmed
- ☐ Post-matter ownership is explicitly assigned and documented
- ☐ Revenue monitoring is scheduled, not triggered by urgency

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Pattern Recognition

Before moving to reflection, review:

- Where does the Managing Partner's name appear most often?
- Where do verification steps feel weakest?
- Which stage relies most heavily on habit rather than structure?

Write one pattern you notice:

Final Reflection

This is not about effort but anchor points.

1. Where in your client lifecycle does responsibility consistently return to you, not because it is strategic, but because it was never structurally anchored elsewhere?

2. Are you prepared to redesign that anchor before growth exposes it?

- ☐ Yes
- ☐ Not yet
- ☐ Unsure

Responsibility Named Is Gravity Redirected

If you completed this MapKit fully, you did more than assign tasks. You interrupted structural drift.

Most firms do not collapse from lack of intelligence or effort. They collapse from unnamed gravity, where urgency defaults to the nearest capable person, where ownership rises upward under pressure, and where clarity dissolves the moment volume increases.

This MapKit is not about perfection but conscious architecture. Every responsibility you named is a decision about the future weight of your firm. Every ownership line you clarified is a ceiling you either reinforced or raised.

Every workflow you completed is either stable under pressure or waiting to revert.

The question is no longer:
"Who can handle this right now?"

The question is:
"Will this hold when the firm grows?"

If what you mapped feels heavier than expected, that is not failure. That is visibility. If what you mapped feels misaligned, that is structural information. The firms that scale sustainably are not the firms that work harder. They are the firms that decide, intentionally, where gravity lives.

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In May 2026, we will examine what happens when responsibility is named but not enforced, and how ownership holds (or fractures) under growth.

Until then, let this stand:

Structure is not administrative. Structure is leadership. And leadership is choosing what your firm will carry, before growth chooses for you.

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Legacy Contracts LLC