



Legalboards

Workflow Optimization Checklist for Lawyers

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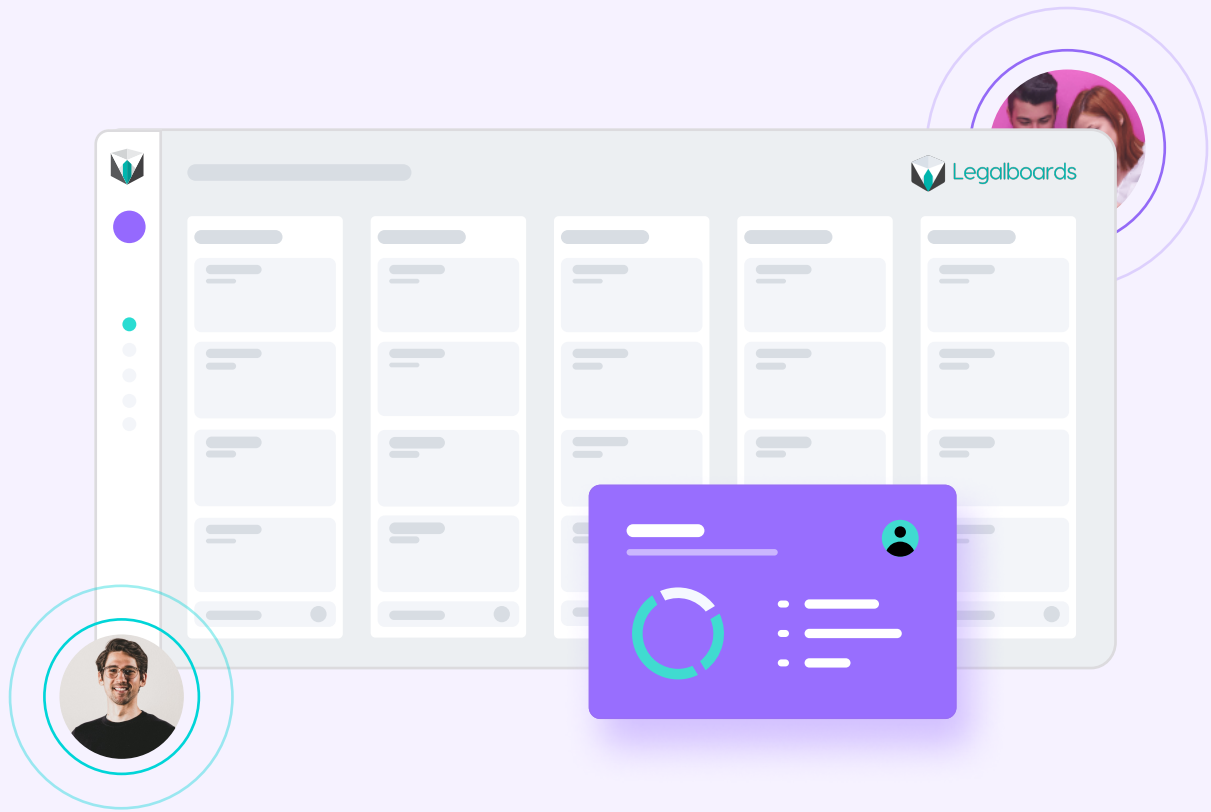
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We know that time is a limited resource for lawyers. One strategy that helps lawyers save time (and stress!) is to streamline their processes. By optimizing what you currently do, you can be confident that you're making the most out of your own time.

We've put together a checklist that's designed to help legal professionals in evaluating and optimizing their current workflows. The goal is to enhance what you currently do to be more productive and efficient. By also leveraging the power of agile methodologies like the Kanban framework and then automating them, this checklist will also allow you to maximize your team's efforts.

Section 1:

Assessing Your Current Workflows

Client/Case Intake:

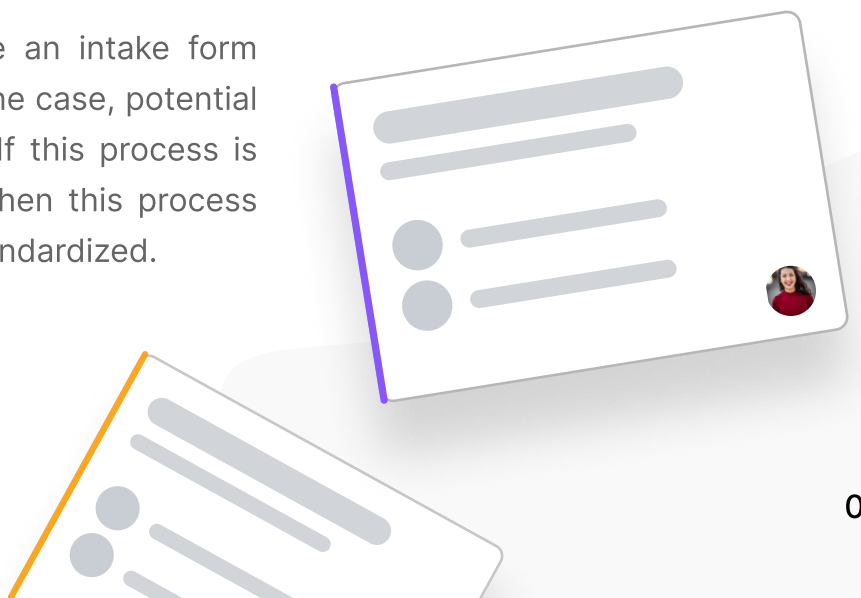
- Are you using a standardized process for case intake and evaluation?
- Do you have a system to track potential clients and cases efficiently?
- How do you prioritize and categorize different cases?

Recommendation: Establish a Standardized Intake Process

Client intake processes are an important first step in your workflow. In 2019, Clio's [Trend Report](#) found that 57% of people search on their own for a lawyer. The report found that while referrals are still important, more individuals are searching for their representation. Getting potential clients is competitive but, by creating a standardized intake process, you can lighten the load for your firm.

By establishing a standardized process, you can ensure consistency for all clients and cases from the jump. By creating a structured approach, you can efficiently gather essential information and make informed decisions about which cases to take or what the first steps of this case will be.

For example, you could create an intake form with relevant questions about the case, potential issues, client information, etc. If this process is followed for every new case, then this process will be both streamlined and standardized.



Document Management:

- How do you organize and store case-related documents?
- Is there a clear system for version control and access permissions?
- Are you leveraging technology for seamless document retrieval?

Recommendation: Implement a Centralized Document Management System

A centralized document management system organizes case-related documents in one location. This reduces the risk of data loss and makes it easier to access and share information securely. For example, using cloud-based platforms like Microsoft 365 or Google Drive to store case documents can help. You can create and structure folders based on cases, practice areas, or by attorney and then assign access permissions to protect sensitive information.



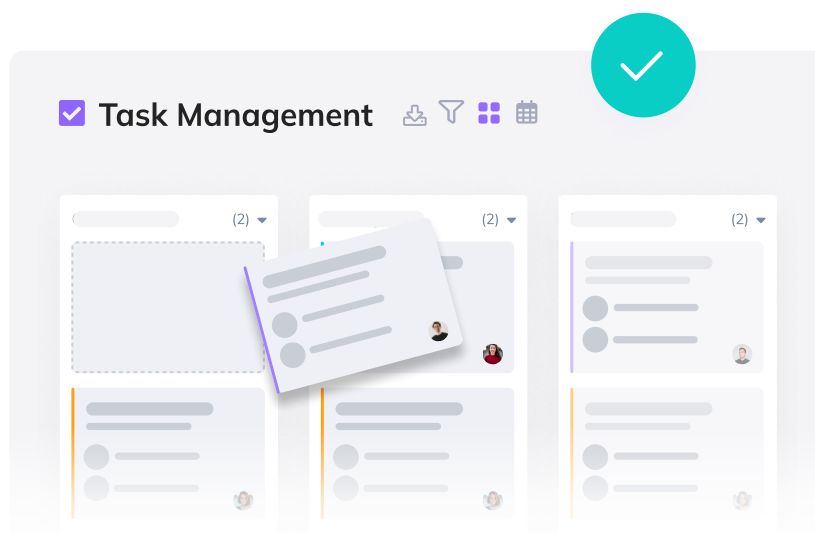
Task Assignment and Tracking:

- How are tasks currently assigned to team members?
- Do you have a centralized platform to track progress on tasks?
- Is there a process for handling urgent or time-sensitive tasks?
- How will you track task progress and measure cycle times?

Recommendation: Adopt Task Tracking Software

Task tracking software allows you to assign tasks to specific team members, set deadlines, and monitor progress in real-time. This enhances accountability and ensures that tasks are completed on time. In the American Bar Association's report on [Legal Project Management \(LPM\)](#), they talk about how important this is for being proactive about workflows while also making processes more efficient.

By utilizing project management tools like Legalboards, you can assign tasks and track their status. Each task should have a clear description, due date, and assignee, making it easy to identify the responsible party and the cases' overall progress. And because of the visual nature of Legalboards (more on that later), you'll be able to see workflows and easily understand your processes.



Communication and Collaboration:

- What tools or channels do you use for internal communication?
- Are there any barriers to effective collaboration among team members?
- How do you manage communication with clients and external stakeholders?

Recommendation: Use a Unified Communication Platform

A unified communication platform streamlines internal communication, reducing the need to switch between multiple tools. It improves collaboration, ensures everyone is on the same page, and minimizes misunderstandings.

Whether that messaging system is Slack, Microsoft Teams, or others, team members should be able to create dedicated channels for different cases, practice areas, etc. This tool should also encourage team discussions, be easily accessible, and connect with other relevant technology so file-sharing or video conferencing can be done directly within the platform.



Section 2:

Identifying Areas for Improvement

Bottlenecks and Delays:

- Are there any recurring bottlenecks in your workflows?
- What factors contribute to delays in task completion?
- Can you identify tasks that frequently get stuck or require additional attention?

Recommendation: Conduct a Workflow Audit

Perform a detailed workflow audit to identify bottlenecks and recurring delays in your processes. Analyze each step of the workflow to pinpoint areas that require improvement.

A good starting point is to review past cases to identify stages that took longer than expected or experienced repeated delays. Investigate the reasons behind these delays, such as excessive revisions, missing information, or dependencies on other teams, and devise strategies to mitigate these issues.



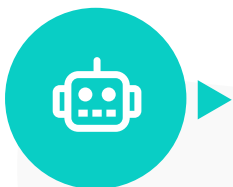
Manual Processes:

- Which tasks could benefit from automation?
- Are there repetitive tasks that consume significant time and effort?
- How can you integrate automation tools into your workflows?

Recommendation: Seek Automation Opportunities

Identify tasks that are repetitive and time-consuming, and explore automation solutions to streamline them. Automation can significantly reduce human error and free up valuable time for more complex tasks.

For example, Legalboards can automate some of your more repetitive tasks. We have automations to help you with assigning tasks to team members, managing timelines, scheduling meetings, sending flat fee billing, and more. To learn more about Legalboards' automation capabilities, click [here](#).



Create the Task “Send to client” after the Task “Review Draft” is completed



After 7 days with no update, send an alert to the responsible attorney

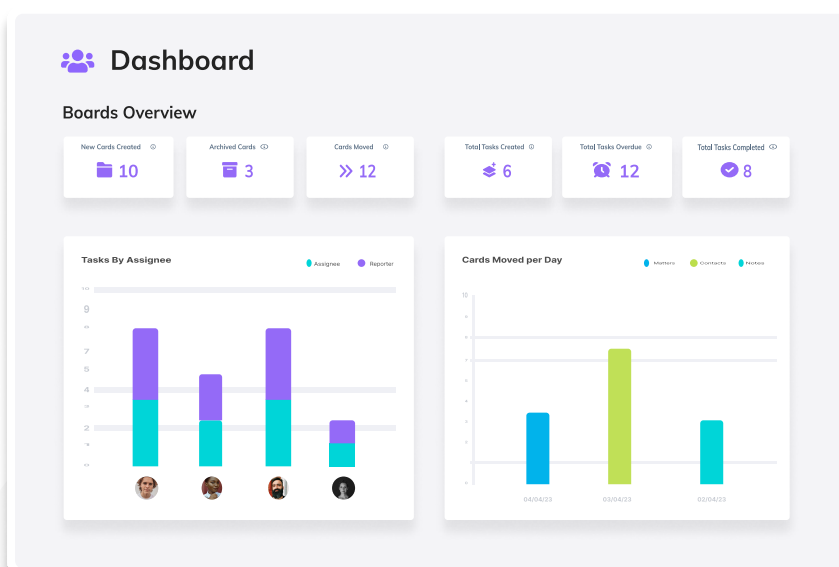
Resource Allocation:

- Do you have a clear understanding of resource utilization?
- Are there areas where resource allocation can be optimized?
- How can you allocate resources effectively to balance workloads?

Recommendation: Monitor Resource Utilization

Evaluate how resources are currently allocated across different cases and tasks. Optimize resource distribution to ensure workloads are balanced, preventing burnout and maximizing productivity. When combined with your task management system, it's easy to see your team's allocation and redistribute caseloads or tasks as needed.

Similar to what we did for bottlenecks and delays, a good starting point here is to review past cases. While reviewing, try to identify periods of resource underutilization or overloading. Then, based on patterns you can see, adjust assignments and delegate tasks more fairly based on expertise, seniority, and time constraints.



Client Feedback:

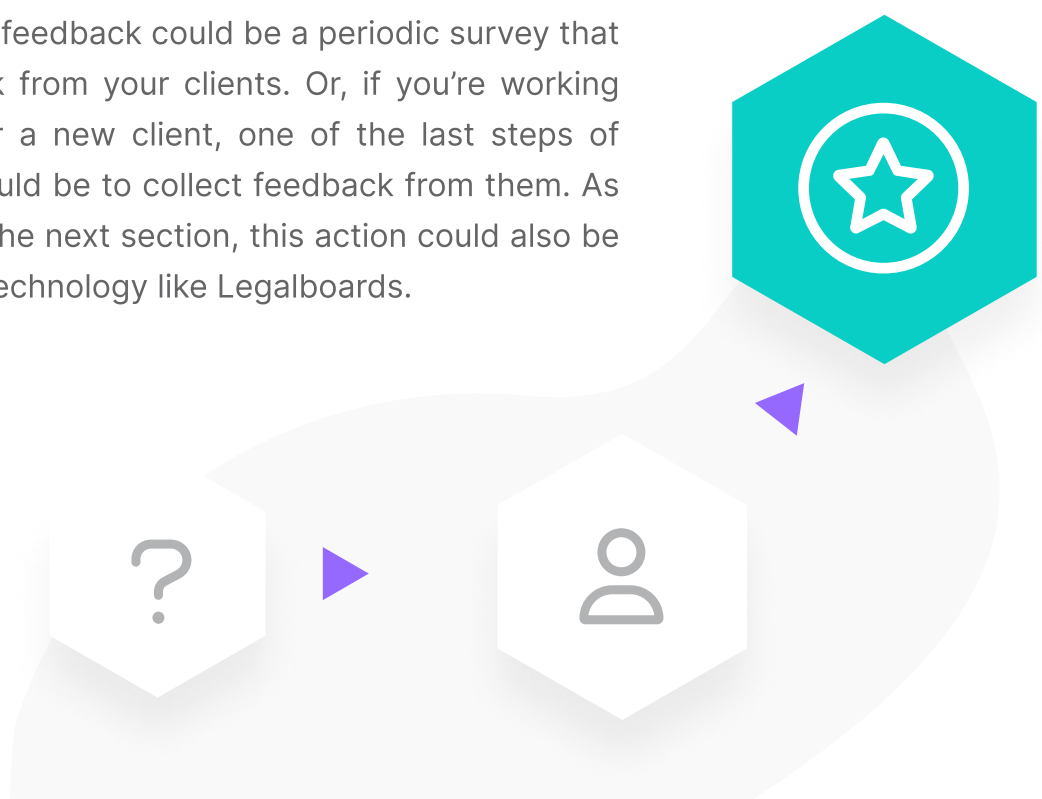
- Is there a mechanism for soliciting feedback from clients?
- How do you learn from past cases to improve future cases?
- Are there opportunities to implement continuous improvement strategies according to client feedback?

Recommendation: Establish Feedback Loops

Encourage open communication within the team and collect feedback from clients regularly. In an [article](#) from Thompson Reuters, they describe how important client feedback is; *“success is predicated on how clients view the services you provide, but most firms are unaware of how they are perceived. Today, a gap exists between how firms see client sentiment and the steps they take to monitor it.”*

Only through analyzing feedback can you identify opportunities for improvement. It’s important to also foster a culture of continuous improvement within the internal team so changes can be readily adopted.

For example, this feedback could be a periodic survey that gathers feedback from your clients. Or, if you’re working on something for a new client, one of the last steps of your workflow could be to collect feedback from them. As we talk about in the next section, this action could also be automated with technology like Legalboards.



Section 3:

Implementing Changes


Adopting Kanban Methodologies, Automation, and Technology:

- Develop and document your technology stack
- Establish a deadline for implementation and training
- Monitor effectiveness and establish feedback loops

Kanban boards are a powerful visual tool to optimize workflows and track tasks efficiently. They help legal teams get and stay organized. Legalboards, a Kanban-based platform designed specifically for legal teams, offers tailored features and functionalities to enhance productivity in the legal industry.

With automations, the team can also save time completing repetitive processes like board or task management and prevent delays with proactive updates and alerts based on the timelines set up by your team.

Technology can help law firms and legal teams improve how they currently work. Tools should align with your needs and connect with other software that you currently use. And, it's important to train your team on how to use these tools so that you can optimize their effectiveness.



Legalboards combines all three of these to allow legal teams to organize their workflows into boards. Boards can be by practice area or attorney-specific, or any other organization that makes sense for your team. Columns represent the phases of a case while cards can either represent tasks or a case itself. By automating the intake process, you can ensure nothing slips through the cracks.

Full Checklist

Assessing Your Current Workflows:

- Are you using a standardized process for case intake and evaluation?
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- How do you prioritize and categorize different cases?
- How do you organize and store case-related documents?
- Is there a clear system for version control and access permissions?
- Are you leveraging technology for seamless document retrieval?
- How are tasks currently assigned to team members?
- Do you have a centralized platform to track progress on tasks?
- Is there a process for handling urgent or time-sensitive tasks?
- How will you track task progress and measure cycle times?
- What tools or channels do you use for internal communication?
- Are there any barriers to effective collaboration among team members?
- How do you manage communication with clients and external stakeholders?



Identifying Areas of Improvement:

- Are there any recurring bottlenecks in your workflows?
- What factors contribute to delays in task completion?
- Can you identify tasks that frequently get stuck or require additional attention?
- Which tasks could benefit from automation?
- Are there repetitive tasks that consume significant time and effort?
- How can you integrate automation tools into your workflows?
- Do you have a clear understanding of resource utilization?
- Are there areas where resource allocation can be optimized?
- How can you allocate resources effectively to balance workloads?
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Implementing Changes:

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Conclusion

We hope that you'll be able to improve your team's productivity and efficiency by utilizing this checklist. By embracing the Kanban framework and other agile methodologies, you've fostered a positive environment for better service delivery, increased client and team satisfaction, and other improved outcomes.

But please remember, it's an ongoing process that needs to be continuously improved. By maintaining a reiterative process and refining your workflows, you'll be able to keep up with, if not stay ahead, of the ever-changing legal landscape.



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