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How Personalized Automated Workflows Boost Law Firm Productivity

Joseph Benstowe · Tuesday, November 7th, 2023

Agile, streamlined processes are what modern law firms need to effectively handle the full gamut of activities required to take a matter from client intake to paid in full. . Firms are under constant pressure to optimize their workflows, reduce manual errors, and maximize billable hours. Technology can address these challenges. But do you have the right technology to be effective — meeting client, staff and attorney expectations?

That depends. Have you embraced workflow [automation](#) yet? To get ahead of the curve, you'll want to look into law practice management systems that offer more than out-of-the-box solutions — you need workflows personalized to your law firm's needs.

Why should law firms avoid out-of-the-box workflows?

Some [workflow automation](#) is better than none, right? Well, it depends. Although the standard workflows that come with some legal practice management software can be convenient and save time, they fall short of custom workflows in several critical ways.

Out-of-the-box workflows follow a one-size-fits-all approach, assuming all law firms have similar processes. However, a generic workflow might not work for different practices because, for example, criminal defense workflows differ markedly from those of a real estate firm. Pre-built workflows might miss steps critical to your practice or include irrelevant steps that can lead to inefficiency and redundancy.

Generic solutions can also hurt adoption. Employees are more likely to engage with technology when it aligns closely with their daily tasks. Out-of-the-box workflows might not resonate with lawyers and staff, leading to low adoption rates. When users don't fully embrace automated processes, your firm won't realize the full value of your investment in technology.

What legal workflows will benefit most from customized automation?

A personalized approach to [workflow automation](#) can significantly enhance the efficiency of a number of law firm processes. Here are just a few examples:

- **Client intake:** Managing client intake efficiently is crucial for any law firm. Workflow automation helps in handling website form submissions, sending personalized response emails, scheduling follow-up tasks, and updating client information promptly.
- **Conflict checking:** Customized conflict check workflows help law firms identify potential conflicts of interest quickly and accurately by cross-referencing client data with existing cases and clients.
- **Case management:** When law firms set up personalized case workflows, they can create task lists, deadlines, and notifications for each type of case; trigger alerts for critical milestones; and assign tasks to specific team members based on their expertise and availability.
- **Document assembly:** Personalized document automation allows law firms to generate customized legal documents tailored to specific client needs. Automation tools can merge predefined templates with client data to create accurate and personalized contracts, agreements, and legal forms more efficiently.
- **Billing:** Personalizing your [billing workflows](#) accounts for the way you bill clients, whether it's hourly, flat fee, or contingency. Workflow tools can streamline the electronic approval process for pre-bills, automate reminders for overdue bills at specific intervals, and manage discounts and interest calculations effectively.
- **Time tracking:** [Automated tools track attorneys' time as they work](#), whether that's sending emails or texts or writing documents. Capturing billable hours automatically reduces the risk of time leakage.
- **Calendaring:** Task management and calendar appointments are automated, ensuring that deadlines and meetings are never missed.

- **Client communication:** With the right tools, you can program client interactions, including emails and follow ups, based on individual preferences and requirements to enhance client engagement and satisfaction.
- **Task assignment:** Custom workflows assign tasks and responsibilities based on team members' skills, expertise, and workload.

It's time to get personal — about your law firm workflows

[Workflow automation](#), especially when personalized, helps law firms work the way they want, and do it faster and more efficiently. By [automating tasks like client intake and billing](#), law firms can reduce errors, accelerate results, and enhance client satisfaction. And, beyond saving time and boosting profitability, customized workflows help firms work the way they're used to, encouraging adoption and sustaining the usefulness of the software for the firm.

[Get a demo today](#) to discover how Centerbase can customize workflows to meet the needs of your law firm.

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