

10 Legal Workflows Every Law Firm Should Automate

Modern law firms lose hundreds of billable hours each year to repetitive administrative work. The workflows below represent the highest-impact areas where automation delivers immediate ROI, reduces errors, and improves client experience.

1. Client Intake & Qualification

Automate intake forms, matter classification, conflict checks, and routing to the correct attorney.

2. AI Receptionist & Missed Call Handling

Capture leads 24/7, qualify callers, schedule consultations, and send instant follow-ups.

3. Conflict Check Automation

Automatically run conflict checks against existing matters before opening new cases.

4. Court Deadline & Statute Tracking

Track court dates, filing deadlines, and statutes with automated reminders and alerts.

5. Document Drafting & Assembly

Generate first drafts of pleadings, contracts, letters, and forms using structured inputs.

6. Client Follow-Ups & Status Updates

Send automated status updates, reminders, and document requests to clients.

7. Evidence & Document Collection

Automate requests for police reports, medical records, financial documents, and exhibits.

8. Billing Triggers & Payment Follow-Ups

Trigger invoices, retainer reminders, and payment follow-ups based on case milestones.

9. Case Closure & Post-Matter Automation

Automate closing letters, document archiving, surveys, and referral requests.

10. Firm-Wide Reporting & Dashboards

Generate automated reports on intake volume, conversion rates, deadlines, and workload.

Firms that automate these workflows typically recover 5–10 hours per attorney per week, reduce operational risk, and significantly improve client satisfaction. Automation is no longer optional—it is a competitive advantage.