



CRM System Audit Checklist for Small Law Firms & Growing Law Firms

Use this checklist to quickly assess whether your current CRM setup is helping or hurting your law firm operations.

1 Client Intake

- Are new leads being captured reliably from all sources? (website, calls, forms, referrals)
 - Is your intake form mobile-friendly and easy to complete?
 - Are follow-up emails or texts triggered automatically after a lead submits info?
 - Can you see the full intake history for each client inside your CRM?
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2 Automation & Workflows

- Are routine tasks like follow-ups, reminders, and status updates automated?
 - Are new matters triggering the correct task list or workflow?
 - Do emails or texts go out automatically at key stages (e.g., consultation, engagement, updates)?
 - Can you assign tasks to the right team member automatically based on matter type or intake responses?
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3 Documents & Templates

- Are your templates (retainers, engagement letters, forms) auto-filling with client info correctly?

- Are document errors or missing fields causing delays or confusion?
 - Is it easy to update templates across all matters when changes are needed?
 - Can you generate key documents with 1–2 clicks?
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4 Pipeline & Case Tracking

- Do you have a visual pipeline or stages to track each matter's progress?
 - Can you quickly see which cases are stuck or delayed?
 - Is each matter assigned a status or stage so your team knows next steps?
 - Are tasks and deadlines connected to each stage?
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5 Reporting & Insights

- Can you track how many leads you get per month?
 - Can you identify where leads are coming from (referrals, ads, website, etc.)?
 - Do you have visibility into billing status, overdue tasks, or team workload?
 - Are you making data-driven decisions — or relying on memory and guesswork?
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6 Team Experience

- Does your team find the system easy to use and navigate?
 - Are tasks being completed on time, or constantly missed?
 - Are there fewer errors and miscommunications since adopting the CRM?
 - Have you provided recent training or updates based on the latest CRM features?
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7 Integrations

- Is your CRM integrated with email, calendar, billing, or e-signature tools?
 - Are there broken or missing third-party connections (QuickBooks, HelloSign, etc.)?
 - Are you paying for tools that aren't fully connected?
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Red Flags That Mean It's Time for an Audit:

- Leads not followed up with consistently
 - Templates broken or outdated
 - You're manually doing work that should be automated
 - You can't get the reports you need when you need them
 - The system frustrates your team more than it helps
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Final Tip:

If you checked **more than 5 boxes as "No" or "Not Sure"** — it's time for a CRM system audit. You could be losing hours every week, or worse, losing clients silently.

 DM me "CRM Fix" and I'll walk you through how to clean it up or rebuild it properly.