PI TECH STACK BY   HakeemSolutions LegalOps

The Personal Injury Tech Stack

13 Stages to Efficient Case Management in 2026

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1. Injury Happens

Capture Evidence Fast Educate potential clients via social media to build trust and generate leads (while positioning your firm as helpful).

Social Media Content Ideas:

"What to do in the first 10 minutes after a car accident (save this checklist)."

"5 photos you should always take after an accident."

"How your phone can help—and hurt—your injury case." Practice Idea: Create a "Post-Accident Evidence Checklist" PDF (Canva/Google Docs) as a lead magnet for your site/socials.

Tech Tools:

Mobile camera/apps for photos/videos of injuries, vehicle damage, scene (skid marks, signage).

Cloud storage: Google Drive, Dropbox, OneDrive, iCloud (enable encryption for privacy).

GPS/dashcam: Built-in phone location history, dashcam apps (e.g., Nextbase or Garmin).

Notes: Evernote, Google Keep, Notion, Apple Notes. 2026 Tip: Encourage clients to use timestamped apps to strengthen evidence admissibility.

2. Client Contacts the Law Firm Goal

Quick lead capture and routing to intake.

Tech Tools:

Forms: Typeform, Jotform, Gravity Forms, or built-in (WordPress/Wix).

CRM/Intake: Clio Grow, Lawmatics, Lead Docket, HubSpot.

Omnichannel: Call tracking (CallRail), email parsing, integrations via Zapier/Make.com. New in 2026: Many firms add AI chatbots for 24/7 initial screening.

3. Client Intake / Initial Case Assessment Goal

Gather facts and evaluate potential quickly.

Tech Tools:

Forms/Chatbots: Typeform, LawDroid, Smith.ai (hybrid AI/human chat, strong for legal in 2025–2026).

AI Evaluation: General AI (e.g., ChatGPT/Claude) or PI-specific to summarize responses, flag red flags, generate snapshots.

Case Management: Clio, MyCase, PracticePanther, Filevine, CASEpeer. Practice Idea: Mock intake → AI summary + strength rating → compare to your assessment.

4. Case Evaluation & Document Review Goal

Assess viability.

Tech Tools:

Advanced AI: EvenUp (demand-ready summaries/valuations), Supio (chronologies, hidden injuries), ProPlaintiff.ai (document review), Legalyze.ai.

CRM Scoring: Custom fields in CASEpeer/CloudLex/Filevine.

Document Mgmt: NetDocuments, Google Drive.

AI Summarization/E-Discovery: Built-in AI or Logikcull/Everlaw. 2026 Note: Supio's CaseAware AI enhances early liability flagging.

5. Client Engagement: Signing the Agreement Goal

 Fast, compliant signing.

Tech Tools:

E-Signature: DocuSign, PandaDoc, HelloSign.

Workflows: Auto-send from CRM (Clio/CASEpeer).

ID Verification: Built-in options. Practice Idea: Template with auto-fields → mock test.

6. Collecting Medical Records and Bills Goal

Efficient, complete gathering.

Tech Tools:

AI-Enhanced: Supio, EvenUp, ProPlaintiff.ai (chronologies, tagging, gap detection).

Integrations: CASEpeer, CloudLex, SmartAdvocate.

Request Software: ChartRequest, Medchart.

OCR/DMS: Clio/NetDocuments (HIPAA-compliant essential). Practice Idea: Medical Provider Tracker spreadsheet/CMS.

7. Ongoing Treatment Tracking Goal

Real-time monitoring to avoid gaps.

Tech Tools:

Portals: Clio, CASEpeer, CloudLex, Filevine.

Automated Check-Ins: Lawmatics, or EvenUp's new Medical Management AI agents (launched Dec 2025 — texts clients about appointments/symptoms).

Logging: Built-in CMS features. Practice Idea: Treatment Timeline template. 2026 Highlight: EvenUp's AI agents are game-changers for documenting ongoing damages.

8. Damages & Compensation Calculation Goal

Realistic estimates.

Tech Tools:

AI Estimation: EvenUp, ProPlaintiff.ai (settlement ranges from comparables).

Built-in Calculators: CASEpeer, CloudLex, SmartAdvocate.

Spreadsheets: Google Sheets/Excel.

Billing Analysis: Flag duplicates. Practice Idea: Damages calculator → AI overview paragraph.

9. Demand Package & Document Preparation Goal

 Persuasive packages fast.

Tech Tools:

Automation: EvenUp (full demands with narratives/comps), Supio/ProPlaintiff.ai (chronologies/narratives).

Document Platforms: Gavel, PandaDoc, HotDocs.

AI Drafting: PI-specific or general AI (lawyer review required). Practice Idea: Mock data → AI-drafted demand → edit.

10. Negotiation & Settlement Discussions Goal

Efficient fair settlements.

Tech Tools:

Logging: CMS notes.

Analytics: Built-in predictors (e.g., EvenUp/ProPlaintiff).

Communication: Secure portals, Zoom. Practice Idea: Negotiation Log → AI counter strategy.

11. Litigation / Court Phase (If Needed) Goal

Strong presentation.

Tech Tools:

Management: Filevine, Litify, SmartAdvocate.

Research: Casetext, Lexis+ AI.

Visuals: Canva, specialized reconstruction software. 2026 Addition: Supio's new litigation drafting/deposition tools. Practice Idea: Timeline slides + AI visual suggestions.

12. Money Received and Distributed Goal

Accurate, ethical handling.

Tech Tools:

Accounting: Clio Manage, CosmoLex, LawPay.

Trust Tools: Built-in ledgers. Practice Idea: Distribution sheet → AI client explanation.

13. Case Closure & Archiving Goal

 Clean close + relationship maintenance.

Tech Tools:

CMS Workflows: Auto-emails/reviews.

Storage: Secure cloud with retention. Practice Idea: Closure checklist → AI case summary.