



## 5 Legal Tasks You Can Automate (And How to Do It)

*Legal Tech That Works*

### 1 Client Intake

How to automate it:

- Use your CRM (Clio Grow, Lawmatics, etc.) to send intake forms automatically
- Embed scheduling links (Calendly, Acuity) into the intake email
- Use a welcome message with next steps as soon as the form is completed

#### ✓ Practice Example:

Estate planning firms can send automated questionnaires for assets, family info, and executor preferences.

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### 2 Reminders & Follow-Ups

How to automate it:

- Use Clio or Zapier to schedule text/email nudges for:
  - Consultation reminders
  - Missing documents
  - Payment due dates

#### ✓ Practice Example:

Immigration lawyers can schedule follow-up reminders for visa renewal paperwork months ahead.

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### 3 Task Assignment Workflows

How to automate it:

- Set up task templates by case type
- Automatically assign tasks to specific roles when a matter is created (paralegal, intake assistant, attorney)

✅ **Practice Example:**

Family law firms can build workflows like:

"New Divorce Case" → Assign Task A to Admin, Task B to Attorney, Task C to Client

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#### 4 **Document Generation**

How to automate it:

- Use document automation tools inside Clio, Filevine, PracticePanther, or Gavel.io
- Pull client data into ready-made templates (engagement letters, fee agreements, pleadings)

✅ **Practice Example:**

PI firms can auto-generate demand letters or retainer agreements based on intake answers.

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#### 5 **Case Status Updates**

How to automate it:

- Use status-based triggers in your CRM or workflow tool
- When case moves from "Intake" to "Active," trigger a message:  
"Your case has officially begun. Here's what happens next..."

✅ **Practice Example:**

Any firm can improve client satisfaction by sending automated milestone updates (filed, scheduled, settled, etc.)

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💡 **Bonus Tip:**

Automation doesn't mean cold, it means consistent.

The best firms use automation to keep things moving even when they're busy.

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✉️ **Need Help Implementing?**

DM me “**Setup Help**” if you'd like me to:

- Review your current system
- Recommend tools
- Build a basic automation flow for you (free starter setup)