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HakeemSolutions LegalOps

Law Firm Growth Systems Checklist

5 Core Business Areas to Scale Without Burnout

1 Client Intake System

- Lead capture forms on your website
- Automated follow-up (email/SMS)
- Online consult booking
- Conflict check built into the workflow
- CRM to track every new inquiry

Recommended Tools: Clio Grow, Lawmatics, Dubsado, Gavel

2 Marketing Engine

- Clear niche and value message (e.g., “Helping small businesses avoid lawsuits”)
- Consistent social media presence (weekly posts/stories)
- Google Business Profile optimized
- Newsletter or blog to nurture leads
- Client reviews + testimonials systemized

Recommended Tools: Canva, Buffer/Later, Mailchimp, GoHighLevel

3 Operations & Automation

- Document templates with autofill (retainers, contracts, motions)
- Task workflows by case type (e.g., Divorce → Petition → Response → Hearing)
- Deadline tracking system
- Phase-based case pipeline
- Automated client updates + reminders

Recommended Tools: Clio Manage, Filevine, PracticePanther, Zapier

4 Delegation Strategy

- Clear roles for team/contractors (legal assistant, intake rep, VA, etc.)
- SOPs for repetitive tasks (intake, billing, follow-up)
- Tech handling admin (e.g., automation of retainer sending or task reminders)
- Offload non-billable work (design, email handling, social posts)

Recommended Tools: ClickUp, Trello, Loom (SOP videos), Upwork/Fiverr

5 Analytics & Reporting

- Monthly report on leads vs. signed clients
- Case duration + bottlenecks
- Income by case type or attorney
- Ad spend ROI (if marketing)
- Client source tracking (where did they come from?)

Recommended Tools: Clio Reports, Lawmatics Reports, Google Sheets, Power BI

Bonus Mindset Shift:

"You're not just building a practice. You're building a system that works when you're not in the room."