Sample SOP – Daily Operations: Legal Practice Efficiency

Objective:

To ensure daily law firm activities are completed efficiently, consistently, and with full visibility across the team.

Tools Required:

- Legal CRM (Clio, Filevine, PracticePanther, etc.)

- Task/Workflow Templates

- Email/Text Automation

- Shared Calendar

- Daily Dashboard View

Step-by-Step Daily Workflow

🕐 9:00 AM – Daily Kickoff

- Open CRM dashboard

- Review today's deadlines, meetings, and overdue tasks

- Reassign or flag anything at risk

9:30 AM – Matter Check-ins

- Prioritize top 3 active cases

- Confirm next steps or upcoming deadlines

- Communicate any delays with client (via automated update or direct message)

10:00 AM – Client Follow-Up Round

- Automated messages go out:
  – Form reminders
  – Consult confirmations
  – Payment nudges

12:00 PM – Case Work + Team Tasks

- Use task templates to assign roles

- Every task = assigned user + due date

- Admin logs new cases into system using workflow

3:00 PM – New Intake & Lead Review

- Check new lead forms

- Assign follow-up task or trigger automation

- Update CRM with lead status (e.g. Scheduled, Not Qualified, Needs Call)

5:00 PM – Daily Wrap-Up

- Log time (if applicable)

- Review dashboard metrics: What was completed, what got stuck

- Add notes for tomorrow's follow-up

Weekly Add-on SOP (Fridays)

- Review reports

- Tag closed matters

- Evaluate what slowed the week down

- Optimize workflows if needed

Notes:

- All client comms should be tracked in CRM

- All tasks must be assigned (no "floating" duties)

- Dashboard = source of truth, not inbox