



SMART TECH Starter Kit for Small Law Firms

A modern law firm doesn't need 50 lawyers. It needs smart systems.

What's Inside This Kit:

- 5 Essential Tools for Small Firms
 - Suggested Platforms (Free to Paid)
 - Smart Workflows to Save Time
 - Bonus: Intake Checklist
 - Setup Tips for First-Time Users
-

1. Client Intake Automation

Purpose: Replace back-and-forth emails with clean workflows.

Recommended Tools:

- **Clio Grow** (Best overall CRM for solos)
- **Lawmatics** (Best for drip emails + intake automation)
- **Typeform + Zapier** (Budget-friendly combo)

Pro Workflow:

 Online form → Auto-tagged → Consultation booked → Intake packet sent → Welcome email automated

2. Document Automation

Purpose: Draft legal documents in minutes with merge fields.

Recommended Tools:

- **Gavel.io** (No-code automation for legal documents)
- **Filevine DocGen** (If already using Filevine)
- **Clio Documents + Word** (Simple merge fields setup)

Smart Tip: Build reusable templates and link them to intake answers. Saves 10+ hours a week.

3. AI-Powered Drafting Tools

Purpose: Get first drafts, research, and summaries done fast.

Recommended Tools:

- Spellbook (for lawyers)
- ChatGPT (with case prompts)
- BriefCatch (legal writing refinement)

Use Case Example:

Upload a deposition → Get a 5-point summary → Draft a follow-up email → All in under 5 minutes.

4. E-Sign + Payment Integration

Purpose: Sign clients and get paid — no manual tracking.

Recommended Tools:

- Clio Payments
- PracticePanther E-sign + LawPay
- HelloSign + Stripe (for budget setups)

Workflow Example:

Retainer agreement → Auto email → Client signs → Auto invoice → Payment confirmation logged

5. Case Tracking + KPI Dashboards

Purpose: Know what's happening in your firm at a glance.

Recommended Tools:

- Filevine Reports
- Clio Manage Dashboards
- Airtable or Notion for DIY tracking

What to Track:

Open cases, overdue tasks, upcoming court dates, time spent per matter, billable vs. non-billable hours

Bonus: Small Firm Client Intake Checklist

Use this before any consultation:

- ✓ Name, email, phone
 - ✓ Legal issue & timeline
 - ✓ Referred by (track referrals!)
 - ✓ Uploads: IDs, prior contracts, etc.
 - ✓ Preferred method of contact
 - ✓ Notes or expectations
-

Final Tip: Start with 1–2 tools.

Don't wait to set up everything at once.

Start small, automate one workflow, and build from there.

Need help setting this up? DM "SETUP" — I'll walk you through step-by-step options for your practice area.