

Law-firm workflow checklist

A law-firm workflow planning worksheet. Illustrative operational guidance, not legal advice or a compliance certification.

MAP INTAKE TO AN APPROVED MATTER

- ☐ Who receives calls, web inquiries and referrals?
- ☐ Which fields are necessary, and which sensitive details should not be collected initially?
- ☐ Who performs conflict review and decides whether to accept the matter?
- ☐ Where are engagement terms approved and stored?
- ☐ What exception requires a human handoff?

CONNECT THE MATTER

- ☐ List the CRM, practice-management, document, timekeeping and billing systems.
- ☐ Define the owner and authoritative record for each field.
- ☐ Document permissions, ethical-wall requirements and retention decisions with qualified counsel.
- ☐ Test duplicate contacts, rejected matters, missing consent and failed integrations.

ACCEPTANCE CHECKLIST

- ☐ A test inquiry reaches the correct reviewer.
- ☐ No matter is accepted automatically without approved authority.
- ☐ Documents and billing records reach only authorized users.
- ☐ Failures are visible and assigned; exports and handover are tested.
- ☐ Training, support hours and vendor fees are agreed in writing.

YOUR BRIEF

Workflow owner: Systems: Current bottleneck: Baseline measure: Target acceptance test:
Dependencies:

Do not email client-confidential data with an initial inquiry.

Questions or to discuss your answers: buy@conqueror.capital · enterprise.conqueror.capital